Maximizer Enterprise™ 8

Simply Successful CRM

User's Guide

Maximizer™

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CHAPTER 1

Welcome to Maximizer

Introducing Maximizer Enterprise

In this chapter...

From Prospects to Leads to Repeat Customers

You are a growing company, looking to take your organization to the next level. To reach this goal and create long-term, profitable relationships with your customers, you need a cost-effective, flexible Customer Relationship Management solution to keep all your departments working together effectively.

Maximizer Software's breakthrough CRM solution, Maximizer Enterprise 8, was specifically designed for small- and medium-sized businesses by integrating sales, marketing, and customer service tools, to enable all customer touch points in your organization to face customers and prospects professionally through one voice. To increase your revenue by bringing in more prospects, qualifying more leads, closing more sales, and retaining more loyal customers.

Throughout the customer life cycle, as prospects from marketing are turned over to the sales department, and customers are passed onto service departments, Maximizer Enterprise makes it easy for your staff to share information, communicate with customers through multiple channels, and organize individual and team efforts. Making your customers feel like king, and giving you an edge over your competitors. After all, gaining new customers and retaining satisfied ones is what improving the bottom line and growing your business is all about.

Sales—Save Time, Close More Sales

Maximizer Enterprise enables your sales staff to manage, track, communicate, and report through all phases of the sales cycle to help them work more efficiently and close more sales. Only Maximizer Enterprise enables you to view the big picture of your customers, as well as the details of each one, so you can leverage each customer opportunity and maximize your total revenue. It is the only solution in its class to offer extensive flexibility, workgroup security, and advanced sales automation and collaboration features. Further, Maximizer Enterprise is easy to use for sales people so they spend less time on administrative tasks and more time on selling.

Marketing—Reduce Costs, Generate More Leads

Attracting attention and generating leads for the sales department is the foundation of marketing. Now Maximizer Enterprise integrates marketing in its total CRM solution to enable marketing departments to manage, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people. Using the Campaigns window, you can create highly targeted campaigns through profiling and qualifying to retain customers and increase business.

Customer Service—Increase Efficiency, Improve Customer Satisfaction

Attracting attention to your products and services is the foundation of Sales and Marketing, but consistent, high-quality customer service is the foundation for keeping your customers for life. After all, it is far more expensive to gain a new customer than it is to retain an existing one. Maximizer Enterprise enables you to cultivate and maintain long-term, profitable relationships by recording and quickly recalling every form of past contact with your customers, so you can exceed your customers' expectations and recommend the right solutions, at the right time. Cross-selling and up-selling are easy when you know your customer's history better than they can remember it themselves!

eBusiness—Generate Leads and Revenue from Your Website

A successful business depends on the relationships you build with your customers. But to save time and conduct repeat purchases, buyers are moving to the web. With the built-in eStore Manager, Maximizer Enterprise lets you easily integrate your web front with your CRM solution for lead generation and online purchases.

Anywhere Access

Your staff is spread out around the continent or around the world, they're on the go at client locations, but you can't afford to have any downtime or inaccurate customer information. Maximizer Enterprise's strength is in its capability to give your staff access to critical data from anywhere, at any time, on any device—at a remote office, through the web, or on a Palm OS device.

Remote Access Through MaxExchange

For users in remote offices to effectively team-sell and face clients and prospects with accurate information, they need to have access to up-to-the-minute data. MaxExchange enables Maximizer Enterprise users to work from a single database that is regularly synchronized to keep everyone current.

Palm and Handspring Access Through Maximizer Link

For your mobile sales force, Maximizer Link enables you to easily take with you on your Palm OS or Handspring device the Maximizer Enterprise information from your desktop PC—then update the information while at a client meeting, and synchronize the information back at the office.

Web Access Through Web Portals

The Maximizer Portals are browser-based tools that improve your organization's efficiency by enabling you and your staff to carry out everyday tasks, from wherever you are, with any computer. See the Maximizer on the Web chapter for more information.

Extend Maximizer Enterprise to Fit Your Needs

Three new Customization Suites have replaced the former Business Partner Integrator's Toolkit and the Integrator's Toolkit. These Customization Suites enable customers and business partners to customize the Maximizer Enterprise interface, and to integrate with other front- and back-office applications.

CRM Customization Suite – customization and integration for Maximizer Enterprise CRM (SQL and Pervasive), including references for COM Object Database Access, MaAccess, OLE Automation, DDE, ODBC, and code samples for customizing Maximizer Enterprise.

eCRM Customization Suite – customization and integration for Maximizer Enterprise eCRM, containing all the functionality of the CRM Customization Suite in addition to references for the web portals.

Advanced Customization Suite – full-featured customization and integration for Maximizer Enterprise eCRM containing all the functionality of the eCRM Customization Suite in addition to references for One to One Designer and Accounting Integration.

Maximizer Modules

Maximizer

Maximizer Enterprise is a robust customer relationship management solution that tightly integrates your contact manager, customer service, and sales requirements.

Maximizer's customer service, knowledge base, and order management features allow you to track and retrieve all customer queries, issues, resolutions, and purchases. Opportunities provide customizable sales strategies that can be used by your sales team to track, communicate, and report through all phases of the sales cycle, with the probability of close being calculated at every stage.

With the creation of meaningful graphs and charts, companies benefit from complete, detailed intelligence to fully understand their audience and evaluate the performance of their business.

The Campaigns window provides you with a tool to set up Automated campaigns—a series of highly-targeted automated emails, faxes, or printed documents—that introduce services, encourage product purchases, promote website visits, or distribute electronic newsletters. Once you've defined the various campaign pieces, and launched the campaign, the process is entirely automated. You can also create "traditional" marketing campaigns that coordinate the activities of marketing team members.

Administrator

Administrator is typically used by a system administrator or other technically-proficient staff to configure and manage the entire Maximizer application. Among other administrative tasks, Administrator is used to create and manage Maximizer users, apply licensing, and create new databases (or "Address Books").

You can also do tasks that common to both Maximizer and Administrator such as back up data, import and export data, produce system reports, and set up and manage sales/marketing teams and security groups.

Reporter

Reporter improves your marketing and selling campaigns by reporting on the success of your current and past strategies. Reporter provides you with several report templates allowing you to produce impressive results in just a few seconds. The module can be accessed through Employee Portal or from the Start menu. See the Maximizer on the Web chapter.

Maximizer Companion Applications

There's more to Maximizer Enterprise than just the main modules. See the following descriptions of our Maximizer companion products.

Crystal Reports 9 Embedded Designer and Viewer

Maximizer includes the Crystal Reports 9 Embedded Designer and Viewer. The Crystal Reports Embedded Designer and Viewer is installed automatically with Maximizer and is accessible from the Reports menu. Maximizer installs a set of standard Sales and Customer Service reports, but you can also create your own custom, shared reports and save them in the Maximizer Reports folder where they can be accessed from the Reports menu.

MaxExchange

MaxExchange is a separate Maximizer application that is opened from the Start menu. It allows you to synchronize Maximizer data between a server and remote computers.

For Maximizer Remote users, refer to "Using MaxExchange Remote" on page 253. For administrators of MaxExchange, refer to the MaxExchange Administrator's Guide.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate Maximizer application that allows you to monitor business data within the Maximizer database and other systems. Potential issues are identified before they create problems so that the people who need to know can act on the information. With Workflow Automation, you can apply business rules to all of your data—no matter where it resides—and learn of potential issues while there is still time to act.

Using Workflow Automation, you can send flexible real-time alert messages via email, fax, pager, PDA (such as Palm or Handspring), and webcast. It's easy to schedule and deliver reports. Lead qualification, lead assignment, and lead tracking are completely automated. Powerful and flexible, the Workflow Automation Suite is quickly deployed, simple to use, and easy to administer so you can focus on building successful, profitable customer relationships.

eStore

eStore is an online store that provides you with the tools to automate your web-based sales. eStore includes everything you need—a shopping cart and product configuring tool, online transaction processing, credit card gateway links, and online credit checking. This application is available for SQL versions of Maximizer.

Refer to "Using eStore Manager" on page 227.

ecBuilder

ecBuilder is an online store that provides the same functionality as eStore. This application is available for Pervasive versions of Maximizer.

Refer to your ecBuilder online manual and help installed with the application. You can access the online manual from the Start menu.

Maximizer Link

Maximizer and Maximizer Link for the Palm OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of the Palm OS device. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use Maximizer Link to synchronize record additions, changes, and deletions between the two products. When data is synchronized regularly, performance speed is optimal because only records that have been modified are read during the process.

MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer, and still be notified of appointments. You'll know if MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it and then forget about it—until the Alarm dialog pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

MaxFinder

MaxFinder, also a Maximizer companion application, lets you browse or search for entries in a Maximizer Address Book. As with MaxAlarm, MaxFinder automatically starts when you start your computer, and its icon resides in your Windows System Tray.

MaxFinder provides a fast alternative for quick lookups and even allows you to record phone calls, time activities, or write notes for any entry in your Address Book without opening a Maximizer Address Book.

Maximizer Form Designer

Maximizer Form Designer allows you to create custom dialog boxes (forms). When adding or modifying Address Book entries, you can then select the form you want to use. To access Maximizer Form Designer from Maximizer's Tools menu, you must choose the Maximizer Form Designer option during a custom installation.

For more information, refer to the online manual installed with Maximizer Enterprise (Help menu > Maximizer Form Designer Guide). You can also refer to the Maximizer Form Designer's online help for assistance.

Maximizer on the Web – the Portals

The Maximizer Portals and eStore are available if you're running Maximizer on a Microsoft SQL database.

Employee Portal

Employee Portal is a browser-based application providing you with the functionality of Maximizer from anywhere in the world. You can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, customer service cases, knowledge base articles, and opportunities, as well as view company documents and other pertinent information.

- Reporter improves your marketing and selling campaigns by reporting on the success of your current and past strategies. Reporter provides you with several report templates allowing you to produce impressive results in just a few seconds.
- Key Indicators is a component of Employee Portal that can be used for monitoring the activity occurring in your company. The information you see in Key Indicators is generated in "real-time", so you have an up-to-date view of the activities taking place in Sales and Marketing. Information such as how many opportunities are in the funnel and your daily revenue from online purchases may be accessed instantaneously.

Partner Portal

Partner Portal is a browser-based application providing a two-way flow of information between your organization and its business partners. This allows for a multi-tier distribution group to effectively distribute sales opportunities and leads, and to keep all involved parties informed about the latest news and customer service issues.

Customer Portal

Customer Portal is similar to Partner Portal. It's a browser-based application providing a two-way flow of information between your organization and its customers. Customers have access to news, events, and customer service issues.

Wireless Employee Portal

The Wireless Employee Portal provides access to Maximizer through any wireless Internet-enabled device.

Where to Go from Here...

Explore Maximizer in a safe training ground

The Maximizer Training Guide is designed to introduce you to the fundamentals of using Maximizer. Using the example of Escona Estate Wines—a fictitious vintner in the Sonoma Valley—you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. Daily tasks in marketing, sales, and administration give you the springboard you need as a novice user to start you on your way to being a Maximizer expert.

To order the Maximizer Training Guide, contact your nearest Maximizer office or your local Maximizer Business Partner.

CHAPTER 2

Finding Information

Access Maximizer Enterprise Help and User Guides

In this chapter...

Overview

Maximizer online Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending a fax to many recipients, building and publishing your online catalog, and recording your contact management information. Maximizer Help and guides have the answers you're looking for.

The types of documentation you can expect to find to help you with Maximizer include:

- **"F1" Help** – context-sensitive help for all windows and dialog boxes.
- **Help Contents** – online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals** – on-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you're looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you're looking for in the online Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window. See "Press F1 for Help" on page 12 and "Open the Help Table of Contents" on page 13.

Each Maximizer module has its own Help. To find out how to use a module, select Contents from the module's Help menu or press F1 in any window or dialog box.

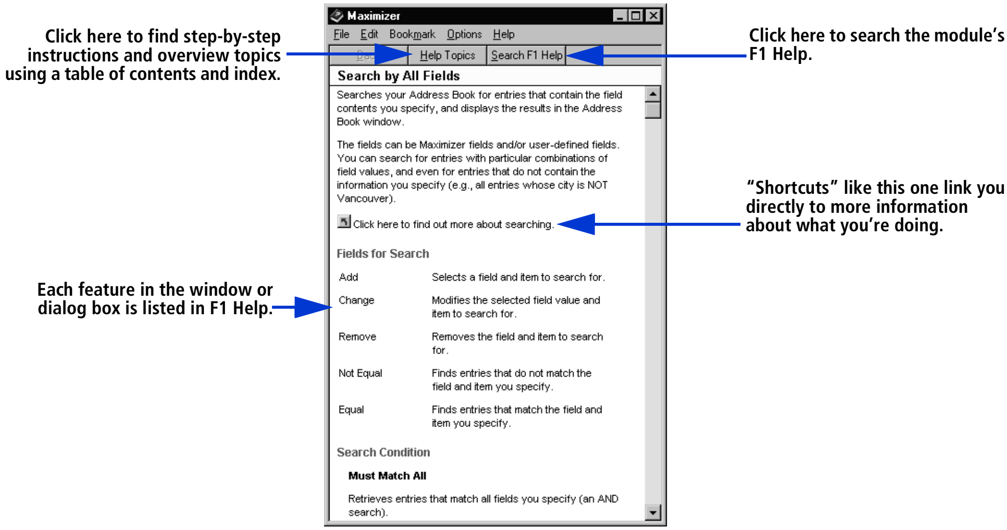
In addition to the Maximizer User's Guide (this book), Maximizer also includes online documentation in Adobe PDF format. You can read the PDFs using Adobe Acrobat or Acrobat Reader, which you can optionally install. See "Read the Maximizer Guides Online" on page 14.

Press F1 for Help

If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 help topics have convenient links to related step-by-step instructions.

From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword. Or, if you prefer to find information using a table

of contents or index, click the Help Topics button in the F1 Help window.



Open the Help Table of Contents

While this guide provides an excellent kick-start to using Maximizer, you may need to locate more detailed information about a particular feature. If so, each module has its own online Help that will provide you with step-by-step instructions.

You can look up Help topics the same way you would in a book—the table of contents lists the topics in a logical order, and the index lets you look up topics by keyword. Maximizer Help also lets you perform a search for any word or words in any topic.

➤ To open the Help Contents for a module

- In any module, select Help > Contents.

➤ To print one or more topics

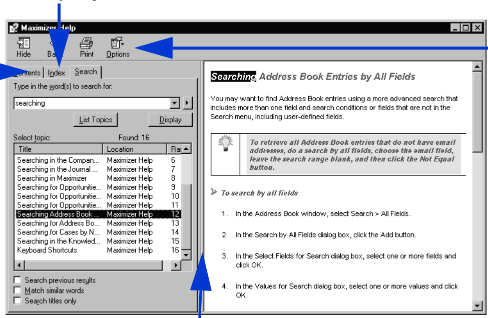
- To print a topic, select it in the Contents and click Print. You can print an entire "branch" of topics—select a book in the Contents, click Print, and choose "Print the selected heading and all subtopics".

➤ Search for topics by any word or words

- In the search tab, type the word or words you are looking for and click "List Topics". Help lists the matching topics and ranks them by how close the topics match your search parameters.

Look up keywords here.

Look for Help topics using the Contents, Index, or Search tabs.



Use the toolbar to perform common tasks in Help.

Drag this bar left or right to move the divider.

Read the Maximizer Guides Online

A typical installation of Maximizer includes manuals that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

➤ Install Adobe Acrobat Reader

- You need Adobe Acrobat Reader to open the online manuals. You can install Acrobat Reader from the Maximizer CD Setup or download the free Reader from the Adobe website (www.adobe.com).

➤ To access the online guides

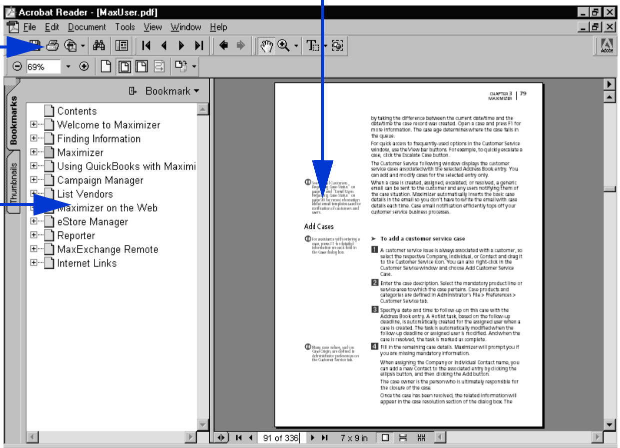
- From the Help menu, select the guide you would like to use. Or, from the Start menu, select Programs > Maximizer Enterprise > Documentation and Help > Maximizer Enterprise Online Documentation. If you want to increase the size of the text, you

can easily adjust the magnification. Open the View menu, and choose Zoom To.

Click on a referenced topic page number to go directly to the topic.

Use the toolbar to navigate—turn the page, change the magnification, search for text in the manual, and more.

Click on a heading in the table of contents to open the page you want.



The pages appear on the screen as they would if they were printed—all of the graphics and text appear the same as in the printed manual. You can “turn the page” by using the previous and next arrows or pressing the Page Up or Page Down keys.

Explore Maximizer with the Sample Address Book

In a typical server installation of Maximizer, the Maximizer setup program creates a complete sample Address Book named “Escona Tutorial”, which is designed to be used as a safe environment in which you can learn how to use Maximizer.

Using the example of Escona Estate Winery, a fictitious vintner in California’s Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities and marketing campaigns
- Customer service cases
- Appointments and hotlist tasks
- Sample Company Library files
- Fully-enabled portals
- eStore online catalog project

CHAPTER 3

Working with Maximizer

Manage Your Address Book Entries

In this chapter...

What is Maximizer Enterprise?

Throughout this guide, Maximizer Enterprise is referred to as Maximizer.

Maximizer Enterprise 8 is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one affordable solution, Maximizer Enterprise 8 helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as customers are passed onto service departments, Maximizer Enterprise 8 enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer Enterprise 8 is a complete software solution that brings together elements of CRM, enterprise sales automation, marketing automation, eCommerce, rapid website development, wireless access, and other related applications to meet the sales, marketing, and customer service challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Pursuing a sale using a structured sales strategy and team-based selling.
- Managing customer service and your knowledge base operations.
- Promoting your product through Automated and Traditional campaigns.
- Sending letters, faxes, or emails to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Printing reports from any of the lists—Address Book entries, opportunities, Hotlist tasks, and additional information (details) you keep on your entries.

Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each window accessible from Maximizer.

My Work Day

The My Work Day screen is an area where everyone in your company using Maximizer can see Hotlist tasks, appointments, and company announcements.

Address Book

The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, customer service cases, opportunities, campaigns, documents, user-defined fields, and orders and inquiries.

Opportunities

The Opportunities window helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision and require the support of a sales team.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

Customer Service

The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry issues can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner. The Customer Service window is tightly integrated with the Knowledge Base window. When a case is resolved, you can enter an explanation of how the case was resolved and save the article in the Maximizer Knowledge Base.

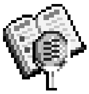
The Customer Service following window displays the customer service cases associated with the current entry in the Address Book window. You can add and modify cases for the selected entry only.

Campaigns

The Campaigns window allows you to create and manage both traditional and automated campaigns. Marketing efforts are easily coordinated amongst your marketing teams. And, through the use of campaign templates, you can create campaigns quickly by modifying the campaign elements.

The Automated Campaigns following window displays all automated campaigns for the current entry in the Address Book window.

Knowledge Base



The Knowledge Base window provides you with a library-style tool to manage your customer service solutions; the window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

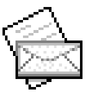
Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Calendar

The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you're busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

Email



The Email window provides you with the ability to send and receive email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

Contacts

The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Customer Service, Campaigns, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

Related Entries

The Related Entries window displays Address Book entries that are linked, or related, to the Address Book entry that is selected in the Address Book window. Any Address Book entry may be related to another. An ongoing description of the relationship may be entered in the Related Entry Description dialog box.

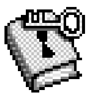
Notes

The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry, customer service case, campaign, or opportunity.

User-Defined Fields

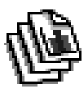
The User-Defined Fields window displays the custom fields for the selected Address Book entry, customer service case, campaign, or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

Personal



The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

Documents



The Documents window displays the document entries for the selected Address Book entry, customer service case, campaign, or opportunity. You can add new documents, as well as files not created in Maximizer, modify a document, campaign, or delete a document.

Company Library

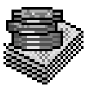
The Company Library is used to store vital sales and marketing information for everyone to access. The Company Library allows you to preview and open any note and many types of files in the preview pane.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window for tracking and post-order fulfillment. You can use the same OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled. It also lets you mark specific orders or inquiries as urgent, ignore inquiries without deleting them, and track shipping and payment status for your orders.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book, Opportunities, and Customer Service windows.

Accounting



If you have the Accounting Link Designed for Use with QuickBooks® add-on component installed, this window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your QuickBooks software.

Window Layout

You can control what windows are displayed and how they're laid out. The Window > Window Settings > Window Layout menu provides three Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer's default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook's display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you only want the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the Window menu or the icons on the icon bar, and then tile the windows using the Window > Window Management > Tile feature. Of course, you can manually size any window.

My Work Day View

The My Work Day screen is an area where everyone in your company using Maximizer can see Hotlist tasks, appointments, and company announcements.

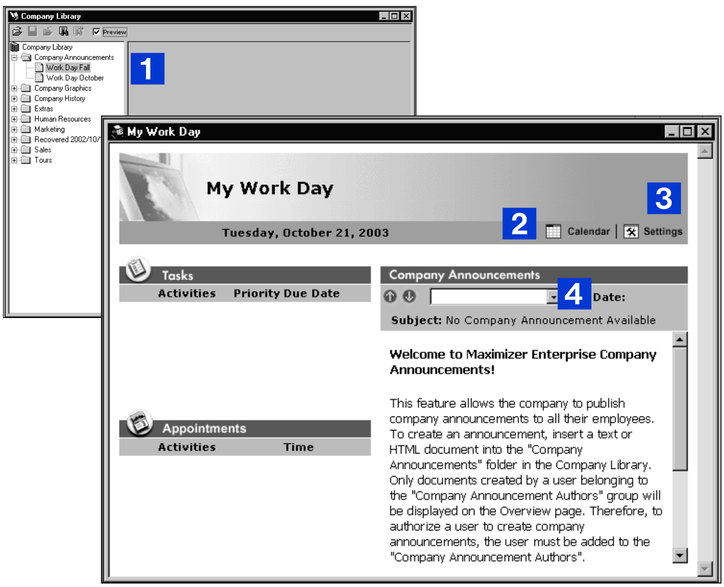
Adjust the My Work Day View

You can adjust the My Work Day view to suit your own preferences.

Although any user can add a document to the Company Announcements folder, you must be part of the Company Announcement Authors security group before your document is visible in the announcements list.

➤ To adjust the My Work Day view

1. To display an announcement, insert the announcement as a note, or as a text or an HTML document in the Company Announcements folder in the Company Library. You can then choose the announcement for display in the page from the drop-down list. You must choose **View > Refresh** or press the F5 key before the announcement is visible in the list.
2. To view tasks and appointments for a day other than the current date, click the **Calendar** button and select a date.
3. To turn Company Announcements off or adjust your startup preferences, click the **Settings** button.
4. To view a different company announcement, select an **announcement** from the drop-down list.



Main Address Book Window

Maximizer is a list-based module, which means that all of the information it accesses is displayed in rows and columns. Lists make it easy to see many entries at once and customize your views.

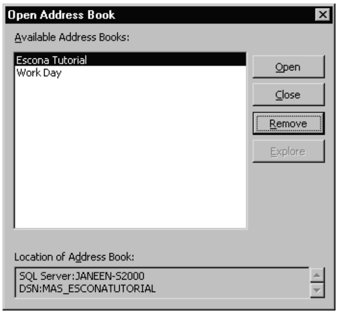
Address Book Window

Typically, most of your activities are done in the Address Book Window.

➤ To open an Address Book window

If you are running Maximizer on a SQL database server, and MaxExchange Remote is not installed, the Global/Local option is not applicable.

- Select **File > Open Address Book**. Choose Local or Global; this setting affects the listed Address Books. A local Address Book is located on your own computer, while a global Address Book is located on a server. Use the Global setting to access shared Address Books. The next time you open Maximizer, the Address Book you last used will open by default.



➤ To work with the Address Book window

1. Use the button with the **pin graphic** on it to hide or display the icon bar view.
2. There are **menu options** for all tasks you can perform in the Address Book window and toolbar buttons are available for common tasks.
3. Maximizer **wizards** are available to help you through tasks such as creating appointments, Hotlist tasks, strategies, and web forms.
4. The **status indicator** shows you when the module is busy when doing tasks such as searches.

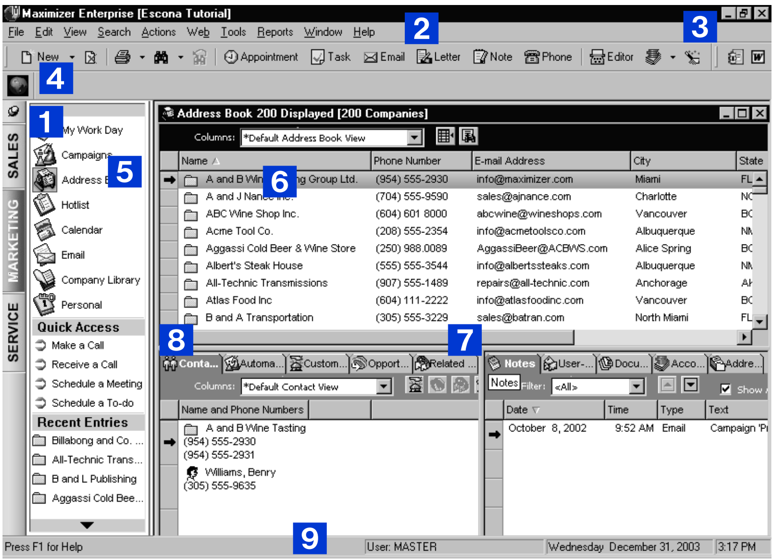
5 The **icon bar** and the **Sales**, **Marketing**, and **Service** tabs provide easy access to the related windows. A Quick Access section is also available for common tasks. A Recent Entries section displays the most recently used Address Book entries. You can click on an entry to make it current.

6 Icons representing **Companies**, **Individuals**, **Contacts**, **Company Sales Leads**, **Individual Sales Leads**, and **Contact Sales Leads** differentiate the types of entries.

7 Tabbed **following windows** display information and attached entries for the selected entry in the main window.

8 The **view bars** in a window or following window contain a view filter and buttons for common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.

9 The **status bar** displays help on the item your mouse pointer is over, and shows the current user, the date, and the time.



As you work with Maximizer, you'll learn to use the many time-saving features. To open one of the Maximizer windows, click an icon in the icon bar or select an item from the Window menu. If you're not sure what a button or icon does, hold your mouse pointer over it to see a "tooltip"—a short description. The status bar also helps you with descriptions of buttons, icons, and menu commands.

Toolbars and the Quick Access section of the window give you quick access to frequently used menu commands. You can display only the toolbars you want or even create your own custom toolbars.

Some functionality is common to both Maximizer and Administrator. For example, adding user-defined fields and adding users can be done in both programs. Please refer to the Maximizer and Administrator online Help and the Administrator's guide for more information.

If you have the Maximizer Customization Suite installed, you can use the View > Customize Interface menu item in Maximizer to customize any of the Maximizer menu labels, window captions, and icons. For more information, please refer to the Maximizer Enterprise Customization Suite.

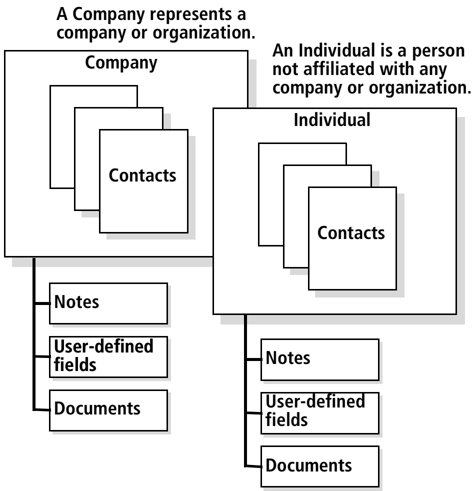
Keep Track of Your Prospects and Customers

Maximizer's focus is on Address Book entries—**Companies**, **Individuals**, and **Contacts**. Address Book entries can also be designated as sales **leads** to help you organize your information.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.

Company and Individual type Address Book entries contain Contacts (people associated with a Company or Individual). You can attach notes, user-defined fields, and documents to Address Book entries.



Add Address Book Entries to Your Address Book

For more information on adding Address Book entries, open the Maximizer online Help and look up "Address Book entry".

Typically, "Company" entries represent a corporate entity you would like included in your Address Book. "Individuals" represent a person who is not affiliated with a company or organization. "Contacts" are entries that are always associated with a Company or Individual. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book window.

Address Book entries can be added to your Address Book in several ways—your eStore online catalog creates a new Address Book entry each time a new customer places an order; you can import your entries from other types of databases such as ACT! and GoldMine; ListsNOW.com, in conjunction with Administrator, allows you to download lists of prospects and import them as Address Book entries; in Maximizer you can manually add new Address Book entries in the Address Book window; and Address Book entries can be transferred from another Address Book (see "Transfer Address Book Entries" on page 204).

Inserting "Dear < >:" (note the space between the angle brackets) in the Salutation field inserts the first and last name when you use merge fields in the Maximizer Word Processor.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the "parent" Company or Individual. This ensures you maintain a record of all interactions with a company, even during staff changes.

➤ To add an Address Book entry

Mandatory customer service user-defined fields and mandatory Address Book entry user-defined fields are set up in Administrator.

1. To add an Address Book entry, click the **arrow** button next to the **New** button on the toolbar and select one of the options. You can also right-click in the Address Book window and choose an option from the Add menu. If you choose to add one of the lead options, the Sales Lead field is selected by default on the Basic Information tab.

   To add a Contact for an entry, select the **Company** or **Individual** to which the Contact will belong. In the Contacts window, press Insert or right-click and select Add Contact.

2. Enter the **name**, the mailing **address details**, **website**, **phone numbers**, and **email addresses** as required. Phone number and email address description types are entered in the field on the left of the number or address.

   To enter an **alternate address** for the entry, click the Address button. To use an alternate address as the default address, select it in the Mailing Address dialog box and click the Select button.

3. Enter the **key user-defined fields**. These are commonly-used fields that are specific to your company. The fields are set up for display in this dialog box in Administrator.

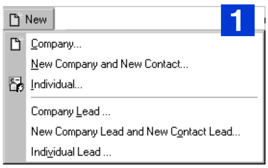
You have the option of opening Address Book entries in view mode or edit mode. This setting is controlled in the System Defaults preferences tab.

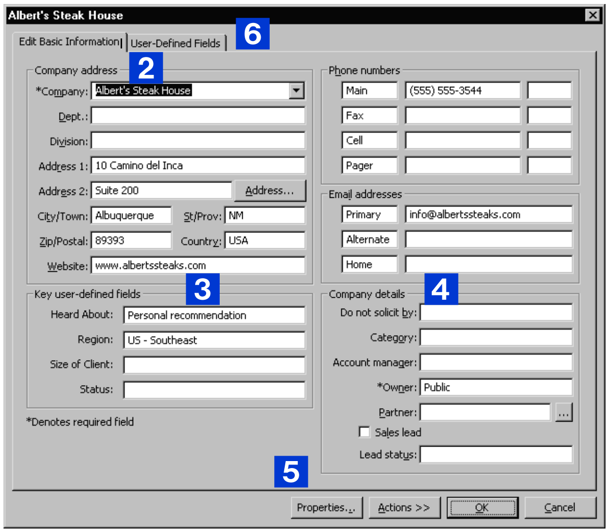
4 Enter the Address Book entry **details** such as the Address Book entry **category**. Click inside these fields for access to the possible field values. If this entry is marked as a **Sales Lead**, and you would like the entry accessible to a **partner**, make sure you set the category to partner.

5 You can perform common tasks associated with the Address Book entry by clicking the **Actions >>** button. Clicking the **Properties** button gives you access to information such as the creation date and Address Book entry identification number.

To view an Address Book entry's properties, select the entry, right-click, and choose Properties.

6 Click the **User-Defined Fields** tab and fill in any associated user-defined fields.





Create a Default Address Book Entry

Creating a default entry provides you with some fields that are already filled in when you create a new Address Book entry. This is useful if you often enter many fields in common, such as the same city or country. Each user in an Address Book can have a unique default entry.

If you are logged in as the Master user, you can edit multiple default entries at once. Choose View > Default Entries for All Users, then select the entries you would like to edit, and choose Edit > Global Edit.

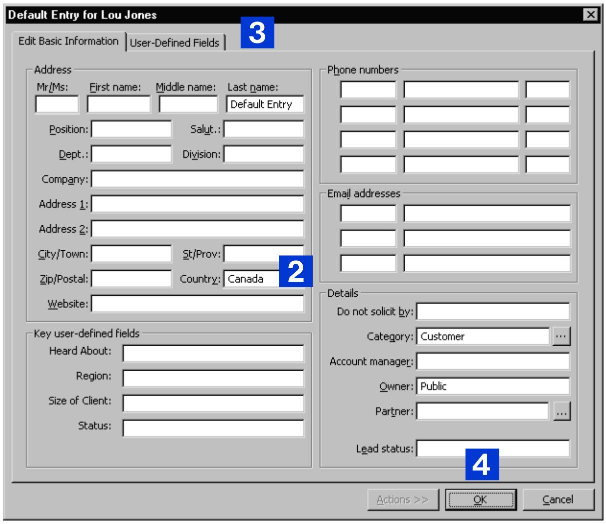
➤ To create a default Address Book entry

1 In the Address Book window, select **Default Entry** from the Edit menu. The Default Entry dialog box appears.

2 Fill in the fields to include as **default information**.

3 Click the **User-Defined Fields** tab to include specific fields in the default entry.

4 When you are finished, click **OK**.



Now, when you create a new Company or Individual, the entry screen appears with the default fields already filled in. The default entry affects all the new Address Book entries you create. When you no longer want to use default information, you should delete the default entry.

Change Several Address Book Entries with Global Edit

You can update a number of Address Book entries at the same time with the Global Edit command. For example, you may want to add a FAX Phone extension to several entries. This is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

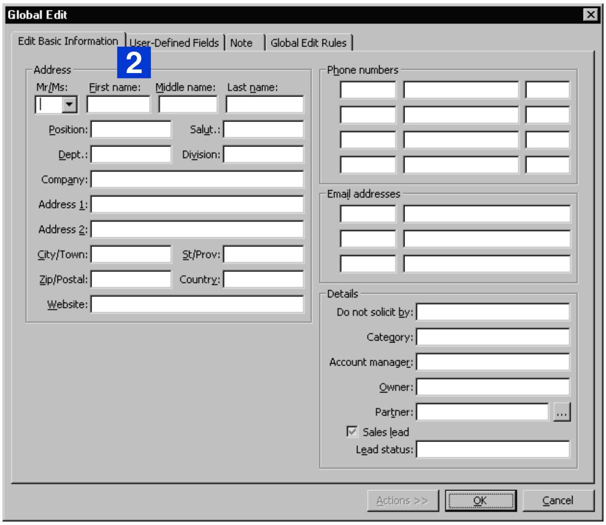
➤ To perform a global edit

1 In the Address Book window or Contacts window, select the **entries** you want to modify.

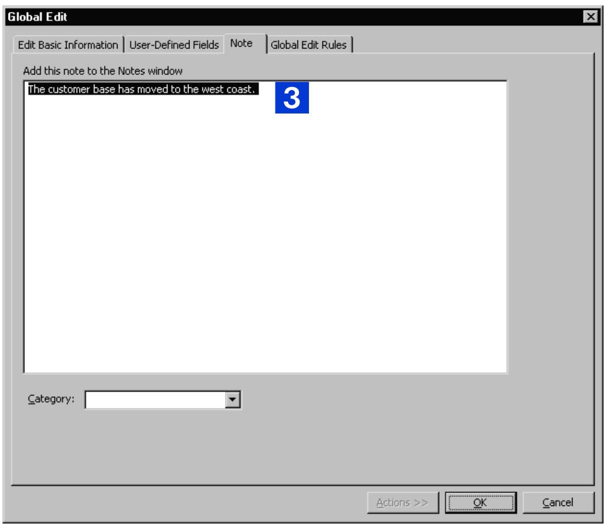
2 Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.

Apply your edits to the Basic Information and User-Defined Fields tabs. Changes made to these tabs are applied in the same way as when you are entering an Address Book entry. The changes are applied to all Address Book entries included in the

global edit. If you don't select any entries, the edits are applied to all your entries in the current list.



3 Click the **Note** tab and add a description for the global edit. This adds a note to each of the affected entries.



4 Click the **Global Edit Rules** tab.

5 Under **Mailing Rules**, set the mailing address options.

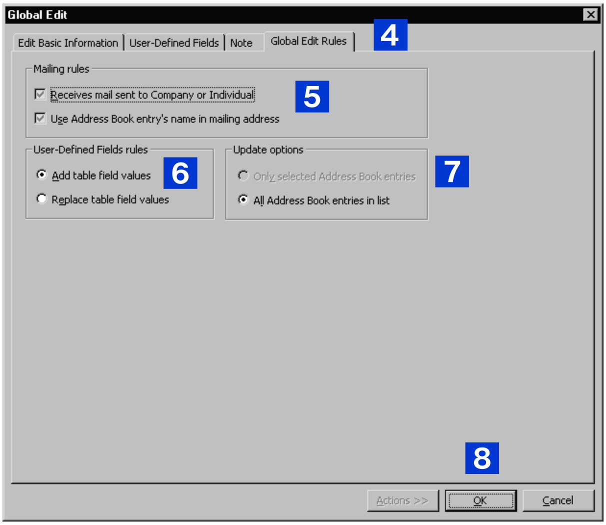
All options in this tab have three possible states selected, not selected, and selected with a gray background.

- The **Receives Mail Sent to Company or Individual** option applies to Contacts. Select it if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.
- The **Use Address Book Entry's Name in Mailing Address** option lists the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

6 Select the appropriate item in the **User-Defined Field Rules** group box. The options in this group box apply to table user-defined fields only. To replace the current user-defined field values with a new list, select Replace Table Field Values. To add new table user-defined field values to existing values, select Add Table Field Values.

7 Select the appropriate item in the **Update Options** group box. This option applies only if you have entries selected in your Address Book window.

8 Click **OK** to perform the global edit. You are prompted with a message to verify that you want to continue with the operation.



Record Relationships with Related Entries

? Press F1 in the Related Entries window for more information on related entries.

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to record these types of relationships in the Related Entries window.

➤ To relate to entries

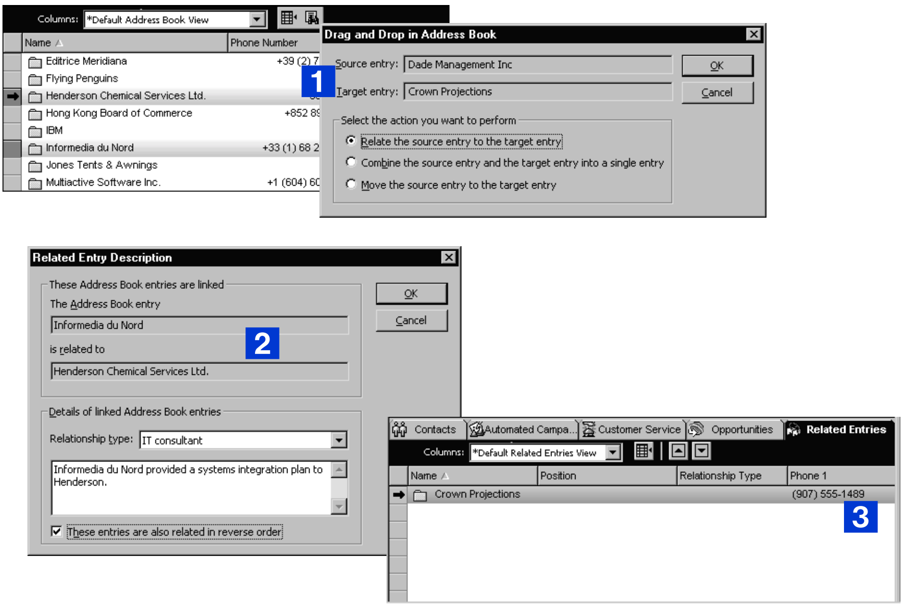
1 Select the two entries you wish to relate to each other and select **Edit > Relate Entries**.

– or –

Drag an entry and drop it on to another entry. In the resulting dialog box, select **Relate the source entry to the target entry**.

2 Specify the nature of the connection between the two entries.

3 Each entry appears in the other's Related Entries window.



Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries window.

➤ To unlink Address Book entries

- Occasionally, relationships that you may have set up between two Address Book entries will change, and you will want to remove the relationship. You can “unlink” two entries by selecting one of the related entries in the Related Entries window and selecting **Edit > Unlink Selected Entries**.

Convert Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry would be more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry—all data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

Any number of Contacts or Individuals can be converted at once.

➤ To convert Address Book entries

- To convert Individuals to Companies, select the Individuals you want to convert and select **Edit > Convert Individuals to Companies**. To convert Contacts to Individuals, select the Contacts you want to convert and select **Edit > Convert Contacts to Individuals**.

Keep Notes on Your Address Book Entries

Notes are used to record activities associated with Address Book entries, customer service cases, campaigns, and opportunities. The Notes window is a following window, which means it displays notes only for the selected Address Book entry, customer service case, campaign, or opportunity.

Use the Notes window to jot down "manual" notes—your ideas and impressions about a customer, a case, or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

By default, notes are logged for all of the main activities you can perform in Maximizer. Logging preferences can be adjusted on the File > Preferences > Logging tab.

Other note types are automatically created by Maximizer, providing a history of all your email, phone calls, letters, timed notes, opportunities, appointments, tasks, customer service cases, campaigns, and transferred Address Book entries:

- **Customer Service** – created when you add a case.
- **Email** – created in the Address Book window when you send an email to one or more Address Book entries. Email notes are also created when you send a campaign.
- **History** – created in the Customer Service, Opportunities, and Campaign windows when cases, opportunities, and campaigns are added or changed.

- **Mail-outs** – created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Also created when campaign activities are sent out as email, fax documents, or printed documents.
- **Manual** – added manually to the Notes window.
- **Opportunity** – created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
- **Other** – third-party or custom notes created by your system administrator. Also, notes created by the Maximizer portals.
- **Phone calls** – created when you dial a phone number, or log a received call.
- **Tasks** – created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task notes, the current owner of the Hotlist task is included in the note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled and when an attendee list is modified, an additional note is logged.
- **Timed** – created when you use the Timer while writing a note.
- **Transfer log** – created when you transfer entries between Address Books.

➤ To work with the Notes window

1. Use the **view filter** to narrow the entries to a specific note type (e.g., "Customer Service" or "Email"). Choosing <Custom…> allows you to search for notes that contain certain text, notes that were created by a particular user or owned by a particular user or group, notes in a specific date range, and/or a combination of note types.
2. Use the up and down **arrows** to view the notes for the previous or next Address Book entry.
3. When adding a manual note, you can assign the note to a custom category using the **Category** option in the Add Note dialog box. Categories are created in Administrator; note categories cannot be created in Maximizer.
4. Use **Show All** to display all notes for a selected Address Book entry. This includes notes belonging to the selected Company/Individual and all associated Contacts. If this checkbox is not enabled, only those notes belonging to the Company/Individual or the selected Contact are displayed.

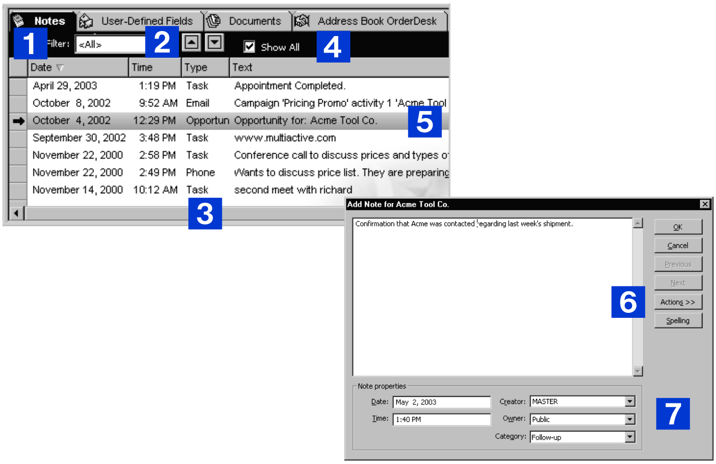
ⓘ While you cannot search or filter for notes using a specific user-defined category, first filter or search notes for a manual type to narrow down the list. Then you can look for the category in the Type column of the Notes window by any user (assuming the note isn't private).

5 Double-click an **entry** to view the entire note. To add a note, right-click while a note in the Notes window is active or press the **Insert** key.

6 You can perform common tasks by clicking the **Actions >>** button in the Notes dialog box. You can also spell check your note text.

7 Adjust any of the note **properties** if you wish. For manual note types, select the appropriate category.

If you wish to enter a note, but you don't want other users to view it, select your own user ID as the "Owner". Only you—and users who have been given the right to "modify others users' private entries"—will be able to read your note. Access to open private entries is controlled by your system administrator using the Administrator module.



Select Search > Notes to find any note you want and select Reports > Notes to produce a Notes report. Simply select the types of notes you want in your search or report.

When notes are transferred to or imported from other Address Books, including those created in previous versions of Maximizer, notes are stored according to the Maximizer Enterprise 8 format as just outlined.

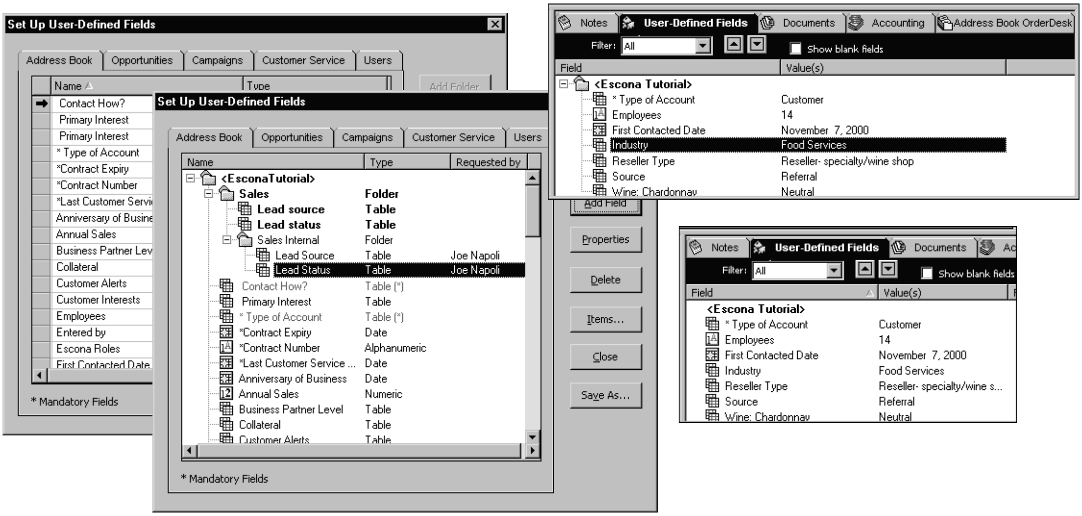
Record Additional Information with User-Defined Fields

? To learn about user-defined fields that pertain to customer service, see "Assign User-Defined Fields to Cases" on page 125.

Although the information you can record for Address Book entries covers the basics, you probably will want to record additional information, such as budget, income, interests, number of employees, or any other data. You can do this with user-defined fields, which are custom fields used to classify your Address Book entries, opportunities, campaigns, customer service cases, and users. Additionally, user-defined fields can categorize information on a per-user basis.

Open the Set Up User-Defined Field dialog box to maintain the list of fields for a specific Address Book entry, opportunity, campaign,

customer service case, or user. There are two available views for user-defined fields—the tree view and the list view.



Keep the following points in mind when working with user-defined fields:

- You can set the default view on the **System Defaults** tab in your user preferences.
- When you select the **Show blank fields** option when using the User-Defined Fields window, all user-defined fields in the Address Book are displayed, not only the fields with existing values. Double-clicking on a field in the window allows you to add or modify a user-defined field value.
- **Mandatory fields** are denoted with an asterisk displayed after the field name and type. This is not the same as having an asterisk included as part of the field name, as it is with the * MaxExchange Distribution field. Mandatory fields are also displayed in green text. System-defined fields are shown in bold, black text.
- The kind of **Address Book information** to which user-defined fields apply—Address Book entries, opportunities, campaigns, customer service cases, or users—controls the window in which the user-defined field is available. For example, if you create a customer service user-defined field, it will be available in the User-Defined Fields following window only when the Customer Service window is the controlling window.
- Your selection of user-defined fields is usually set up by your system administrator using Administrator, however, any user can

be given the rights to **create**, **change**, or **delete** user-defined fields in Maximizer. If you have not been given the ability to set up user-defined fields, you can only assign values to existing fields.

- In the **tree view**, the Master user can set a custom sort order of user-defined fields and folders by dragging and dropping the fields.

You can record custom information in one of four types of user-defined fields:

- **Table** – A definable list of items that you select or de-select for each entry that uses the field.
- **Date** – Date information only (e.g., birthdays, anniversaries, due dates, etc.).
- **Alphanumeric** – Includes both numbers and letters. Your system administrator can encrypt this type of user-defined field for security protection. When searching on these fields, you can enter just the first few characters to find the field. For example, you could enter "av" to return a list of fields beginning with these letters.
- **Numeric** – Numeric values only (e.g., quantities, prices, etc.).

➤ To record information with user-defined fields

1. Select **File > Set Up User-Defined Fields**. The Set Up User-Defined Field dialog box appears.
2. Optionally, you can create a folder to contain a group of related user-defined fields. To do so, click the **Add Folder** button and enter a folder name. Your user-defined field setup structure can be multi-tiered; you can create folders inside of other folders with a limit of 3 folder levels.
3. Select the corresponding tab for the type of field you are creating and click **Add Field**. The Add User-Defined Field dialog box appears. Type a descriptive name for the new user-defined field.

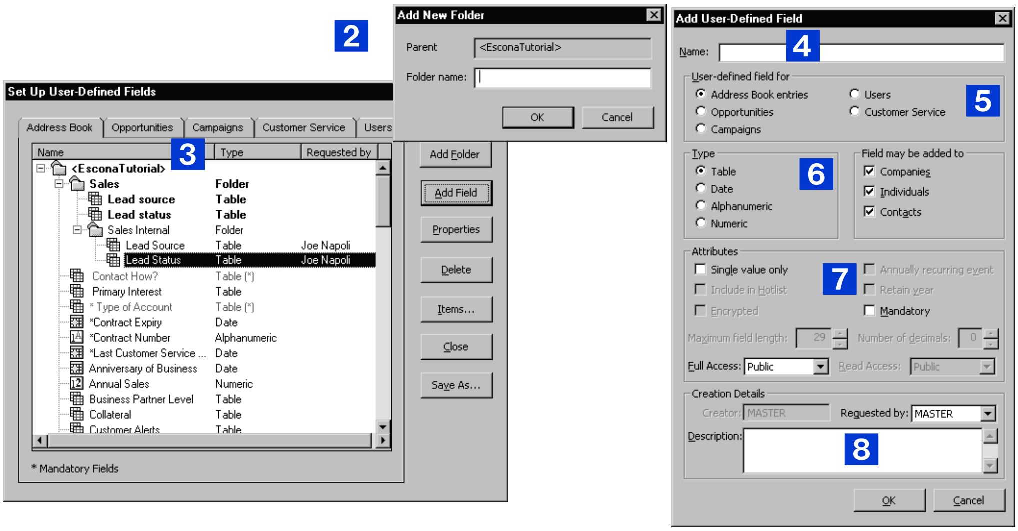
   – or –

   You may also right-click in the User-Defined Fields window, choose **Add User-Defined Field**, and then click **New Field**.
4. Type a descriptive **name** for the new user-defined field.
5. Select the **type of entry** to which this user-defined field applies if necessary (depending on how you accessed the Add User-Defined Field dialog box, this option may not be available). For example, if you choose Users, this appears as part of the available user-defined fields in a user's properties (File > Users).

6 Specify the **type of user-defined field** this is and select the type of entry to which the field may be added.

7 Specify the **field attributes**. Only alphanumeric type fields may be encrypted. Setting access rights provide a way for a field to be modified by only a specific user or group, or be made public.

8 Fill in the field **creation details** including the name of the user who requested the field be created and the description.



➤ To change the values for a table user-defined field

- Double-click on the field in the **User-Defined Fields** following window.

  – or –

- Double-click on the field in the **Set Up User-Defined Fields** dialog box or select the field and click the Items button. Then click the Modify button.

➤ To change the properties for a user-defined field

- Select the user-defined field in the Set Up User-Defined Fields dialog box and click the **Properties** button.

When you change the selection for the view of user-defined fields, both the User-Defined Fields window and the Set Up User-Defined Fields dialog box are affected.

➤ To change your view of user-defined fields

1. Select **File > Preferences**.
2. On the System Defaults tab, select the **View user-defined fields in a tree view** option. If this option is not selected, user-defined fields are shown in a list view.

➤ To change the values of user-defined fields created for Maximizer users

You can modify user-defined fields that are related to users in a couple of different ways—you can make the changes specifically for a particular user or you can change the field for the Address Book.

1. Select **File > Users** and select the corresponding user, click the Properties button, and select the **User-Defined Fields** tab.
2. Click the **User-Defined Fields** tab and select the field you wish to modify.
3. Double-click on the field or click the **Edit** button.
4. Modify the contents of the field as necessary and click OK.

– or –

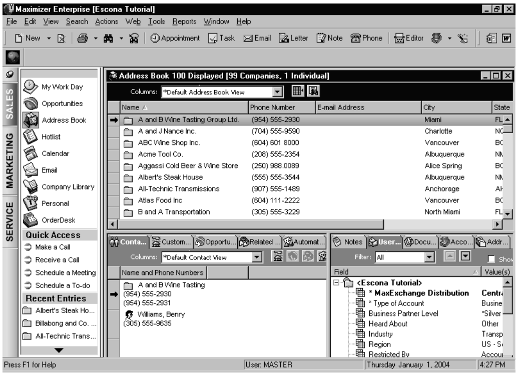
1. To edit the field globally, select **File > Set Up User-Defined Fields**.
2. Select the **Users** tab and select the field you wish to modify.
3. Double-click on the field or click the **Edit** button.
4. Modify the contents of the field as necessary and click **OK**.

Create a List of Entries with a Search

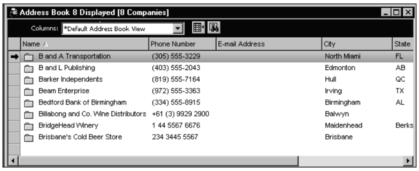
Many of the actions you can perform with Address Book entries, customer service cases, campaigns, and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

A search retrieves any entries that match the search criteria and that you have the rights to view.

Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.



In this example, a search was performed on the full Address Book entry list (left) for all Address Book entries starting with "B". The list was replaced with the matching entries (below).



For assistance with searching for customer service cases and knowledge base articles see chapter 1 "Provide Customer Service" on page 1.

Search for Entries by a Field

Maximizer makes it easy to search by some of the basic fields, such as Last Name, Company, City/Town, or Email for Address Book entries or by Status, Team Leader, or Revenue for opportunities. The Search menu varies depending on what window is selected.

➤ To search entries by a field

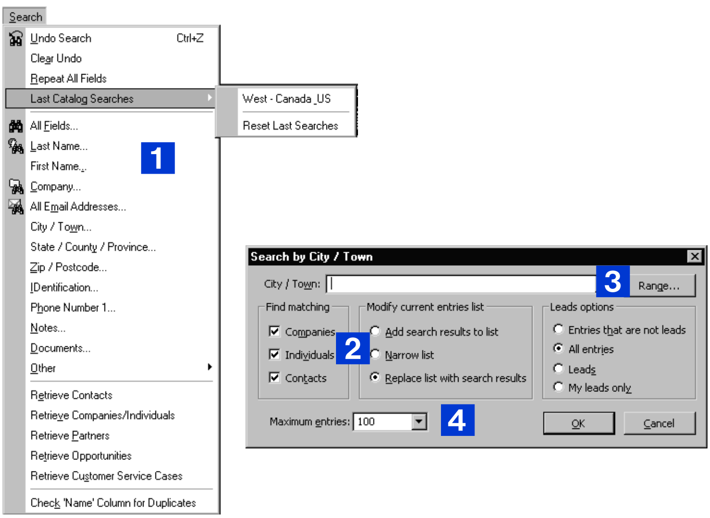
1. From one of the main windows such as the Address Book window, Campaigns window, or Opportunities window, select the **field** you are searching for from the Search menu. Select **Other** to see additional fields by which to search your Address Book entries.

2. In the Search By [field] dialog box, specify the search criteria.

   You can select one of three options for updating the current list with your search results. **Add search results to list** searches the entire Address Book and adds the matching entries to your list. **Narrow list** searches your current list and reduces it to the matching entries. **Replace list with search results** searches your Address Book and replaces your current list with the matching entries.

3. If applicable, specify the **range** of the items to be searched.

4. Specify the **maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.



Perform an Advanced Search by All Fields

In the Address Book window, you can click Repeat All Fields to repeat the last search. Once a search is saved in the catalog, you can access the most recent catalog searches right from the search menu.

Maximizer's Search by All Fields feature is useful when you need to search by fields that aren't listed in the Search menu or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search for later use.

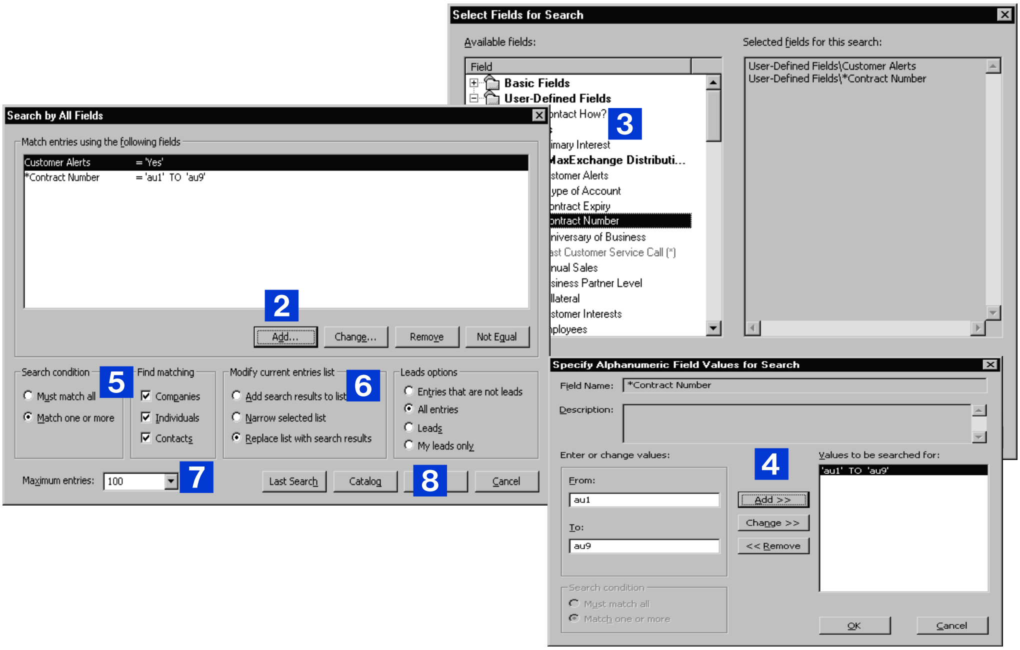
Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and other fields to produce a custom list of Address Book entries, opportunities, campaigns, and customer service cases.

1. In the Address Book window, select **Search > All Fields**.
2. In the Search by All Fields dialog box, click the **Add** button.
3. In the **Select Fields for Search** dialog box, select one or more fields and click OK.
4. In the **Specify Field Values for Search** dialog box, select one or more values, click the Add button, and then click OK. For each field you've chosen for the previous step, you will be prompted to specify the values. Use the search condition options to further narrow your search.
5. Specify the remaining **search criteria** in the Search by All Fields dialog box.

   If you wish to build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

   To retrieve all Address Book entries that do not have email addresses, do a search by all fields, choose the email field, leave the search range blank, and then click the Not Equal button.
6. The matching entries in the Address Book will replace the current Address Book entry list. Select an option according to how you would like the current list to be updated. You can choose to further narrow the search by specifying options to include or omit sales leads.
7. Select or type the **number of entries** you would like to be returned and click **OK** to begin the search.

8 Use the Last Search and Catalog buttons to perform previously defined searches.



For assistance with searching for customer service cases and knowledge base articles, see “Create Web Inquiry Forms for Your Website” on page 58 and “Record a Case Solution” on page 133.

Create a Favorite List from a Search

After you’ve performed a search, you can create a favorite list so it can be easily accessed.

➤ To create a favorite list of Address Book entries

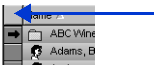
- Search for the Address Book entries you want saved in a custom list, select **View > Favorite Lists**, and then click the **Add** button to name the list in your Address Book window. If you want this favorite list to appear each time you open Maximizer, select the **Retrieve this list when an Address Book is opened** option in the Favorite List dialog box. Once checked, this setting overrides the **Ask at program startup which Address Book list to view** option on the **System Defaults** tab. To retrieve the list, select **View > Favorite Lists** and select the list you want to view.

Select and Display Entries in a List

After you've performed a search, you will most likely want to perform some action on the entries or a subset of the entries. There are a couple of ways to quickly select and display entries in a list.

➤ To select all entries in a list

- Click the **gray button** on the far left of the corner of a main window such as the Address Book window as shown below.



➤ To display only selected entries

- If you have selected several Address Book entries in your current list, select **Edit > Make Selected List Current** to remove the deselected entries from the current list and only display the selected entries.

Track Your Appointments and Hotlist Tasks

? To learn more about the Hotlist window, press F1. For assistance adding a Hotlist task, select the Wizards button on the Standard toolbar and run the Add Hotlist Task wizard.

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow-up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Hotlist Window

Because the Hotlist is a controlling window, all your following windows update with it providing you with instant access to all information about the person or organization with which you are dealing. You can quickly handle all your communications—from phone calls to email—and record the results directly from the Hotlist.

Tasks can be reassigned to another user. When a Hotlist task is added or reassigned, a note is created in the Notes window. This note includes the name of the person to which the Hotlist task is assigned.

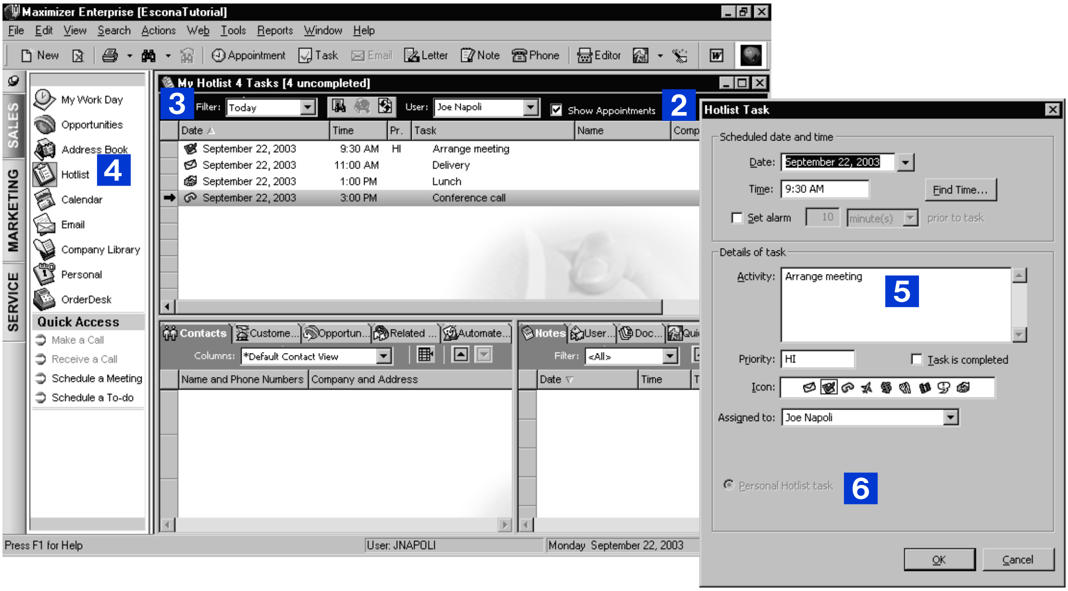
The Hotlist window is also associated with the Customer Service window. A Hotlist task, based on a case's follow-up deadline, is automatically created for the assigned user when a case is created (assuming a user and follow-up deadline are assigned). The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as

complete. To learn more about the customer service cases, see "Create Web Inquiry Forms for Your Website" on page 58.

Your Hotlist can also show tasks for opportunities if you're a member of a sales team. Team leaders assign these tasks to you.

➤ To use the Hotlist window

1 Click on the **Hotlist icon** or choose **Hotlist** from the Window menu.



2 Select the **Show Appointments** option to have your appointments appear in your list with your tasks.

3 Use the **view filter** to choose the date range you want to show.

4 To add a new task, click **Insert** in the Hotlist window.

– or –

If a task is associated with an Address Book entry, select the **entry** in the Address Book window and drag it to the **Hotlist icon**.

You can view or modify an existing task by double-clicking the task.

5 Select a pre-defined **activity** from the drop-down list (click inside the text box to access) or enter an activity.

6 A task can be personal or associated with an Address Book entry. To mark a task as personal, select the corresponding option. Otherwise, the task is created for the current Address Book entry.

Control Calendar and Hotlist Task Preferences

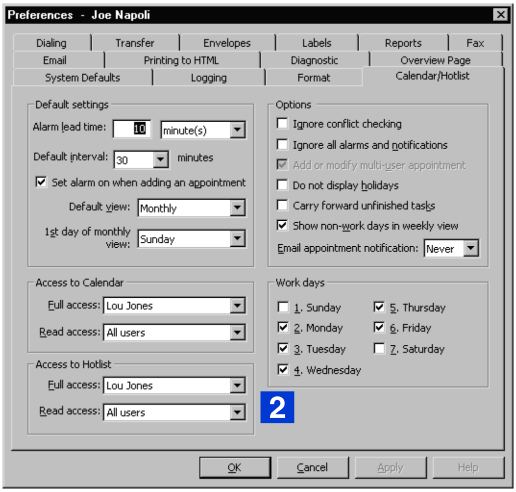
Use the Calendar/Hotlist preferences tab to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

ⓘ Hotlist and calendar preferences can also be controlled in Administrator using the user preferences Calendar/Hotlist tab.

➤ To set calendar and task preferences

1. Select **File > Preferences** and click on the **Calendar/Hotlist** tab.

2. Set your **calendar** and **hotlist default options**. For detailed information on each option, press F1.



You can control which users can view or modify your tasks and appointments using the **Full Access** and **Read Access** options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down menu. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

ⓘ Appointments can be reassigned through the Hotlist window.

The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

Calendar Window

The daily view shows your day in half-hour intervals—use the Calendar/Hotlist preferences tab to change this interval length.

The Calendar window is where you schedule meetings and appointments. You can view, add, update, and delete appointments.

There are a few different available views of the Calendar window—Daily, Weekly, and Monthly. All views are graphical so you can see all your appointments at a glance.

You can view another user's calendar if that user has given you "read access" or "full access”. To assist you with scheduling, color bars indicate the attendees and booked resources/locations for the appointment. Note that this includes each of the users and resources/locations you have selected for your Calendar window.

Your system administrator uses the Utilities > Holiday Editor in Administrator to set up the holidays that are displayed in the Calendar window. These holidays can be changed. For further information, see the Administrator’s guide.

➤ To use the Calendar window

1. In the **Calendar** window, click the associated button to choose your calendar view—**daily**, **weekly**, **monthly**, or **today**.
2. In the monthly view, holding your **mouse pointer** over a day displays all the appointment details for that day in a pop-up window. You can then hold your mouse over a particular appointment to view the appointment details. Or, you can click on the appointment in the pop-up window to open it.

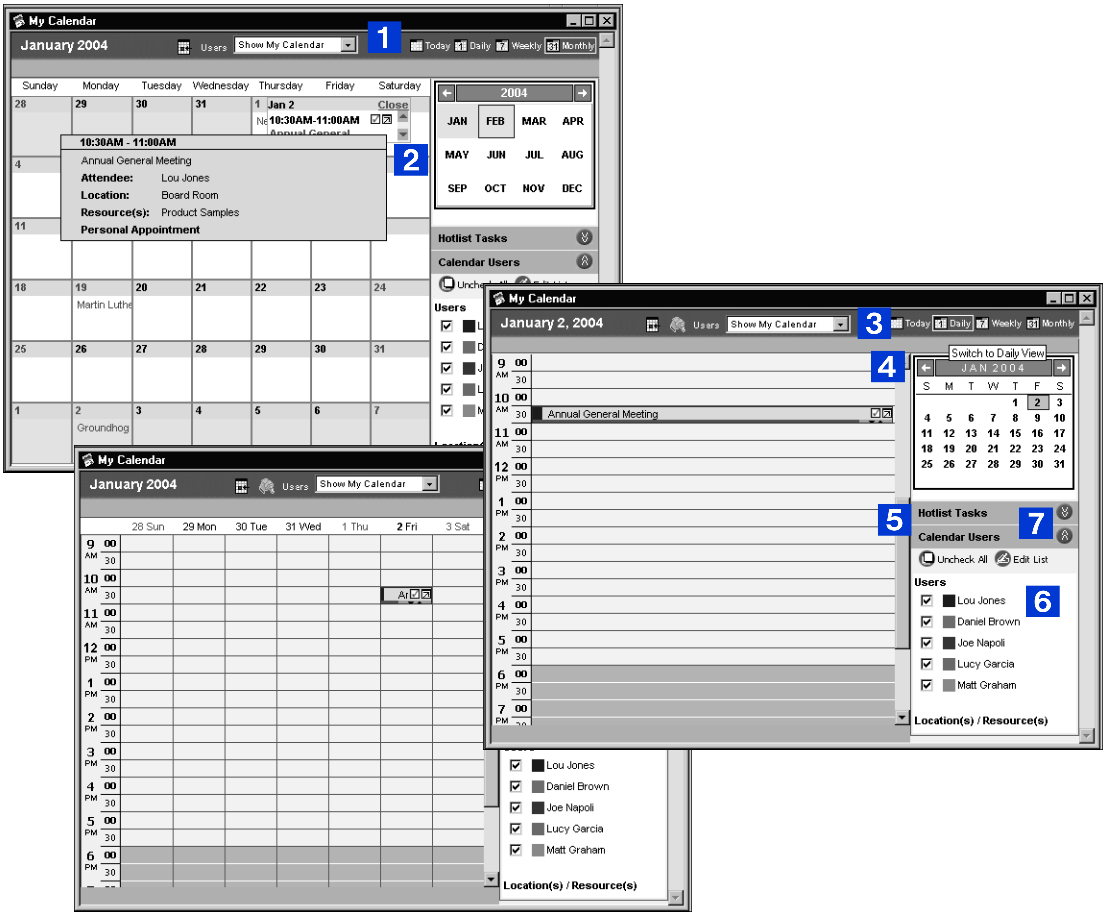
   In the weekly and daily views, holding your mouse over an appointment displays the appointment details. Double-clicking on an appointment opens it.
3. **Open another user’s calendars** by selecting a name from the User’s drop-down list. Both the selected user’s appointments and your own appointments are displayed. You can also view the booked time for meeting locations and resources by choosing the corresponding value in the list.
4. Click the calendar **arrows** to move from one year or month—depending on the view you are using—to the next. Click on a month or day to show it in the main portion of the Calendar window.
5. The day’s Hotlist tasks are listed in the Hotlist Tasks section. Click a **Hotlist task** to view the details of the task.

If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

6. You can view other users’ appointments at once by adding the users to the **Calendar Users** list and selecting the checkbox beside the users’ names. Use the Check All and Uncheck All options to quickly select all users in your Calendar Users list. To

add users and resources to the calendar, you use the Edit List option. Click the edit button to modify the list properties, including the colors that are associated with the selected users.

7 Use these **buttons** to hide the associated section of the Calendar window.



Add a New Appointment to Your Calendar

You can easily schedule an appointment with an Address Book entry, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and even who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the

priority, and even send an email to the selected users, the associated Address Book entry, and yourself.

You can schedule appointments from any controlling window, in addition to the Calendar window, although the simplest ways vary slightly depending on what window is active.

Appointments can be viewed in the Hotlist window provided you select the Show Appointments option on the Hotlist's View bar (if you are using the Outlook Style window layout, you may need to drag the following windows a little to the right). Calendar appointments can be reassigned to other users through the Hotlist window.

Other users can view your appointments, or even schedule them, if you have given them access using your Preferences > Calendar/Hotlist tab. When an appointment is marked as private, even those with access to your calendar cannot see the appointment details.

➤ To schedule an appointment

1. In a controlling window, select an entry if you would like to schedule the appointment with a specific Address Book entry and do one of the following:
   - Right-click and choose **Schedule > Meeting**.
   - Click the **Appointment** button on the toolbar.
   - Drag the **entry** from the controlling window to the **Calendar** window or the **Calendar Icon**.

   – or –

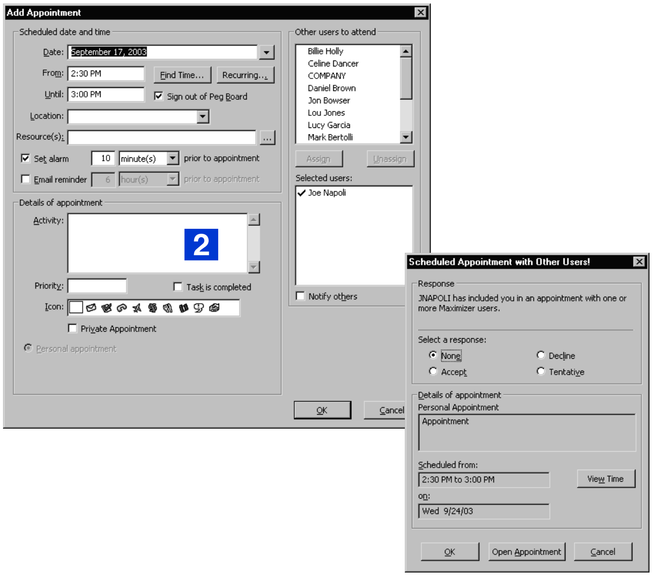
   In the Calendar window, select a date and do one of the following:
   - Right-click and choose **Add Appointment**.
   - Click the **Appointment** button on the toolbar.
   - From the Edit menu, select **Add Appointment**.
2. In the Add Appointment dialog box, fill in the details of the appointment. Keep the following points in mind when you're filling in the appointment details:
   - Select **Free Time** from the View menu to pick a time when all users are free. Clicking the Free Time button in the appointment dialog box displays only your schedule.
   - To schedule a recurring appointment, click the **Recurring** button. Press F1 for more information on the options associated with recurring appointments.
   - If you want this appointment to change your Peg Board status, check the **Sign Out of Peg Board** checkbox.

- Choose a **location** for the appointment and specify the needed **resources**. These values are set in Administrator. The busy time for resources and locations include the booked time for the users that have allowed you access to their calendars. These users must be included in the Users section of the Calendar window.
- To set an alarm, check the **Set Alarm** checkbox and specify the time prior to the appointment. See File > Preferences > Calendar/Hotlist to control the default setting for alarms.

You can adjust your Calendar/ Hotlist preferences to have Maximizer prompt you each time an appointment is created involving other users asking if you would like an email sent as a reminder. You can also set your preferences to always automatically send an email. By default, an email is never sent.

- To send yourself an email reminder (an email will not be sent to the associated Address Book entry or selected users with this option selected), check the **Email Reminder** checkbox and specify how much earlier than the actual appointment the email should be sent. Type the number and select the time units. This generic email lists the basic appointment details; you cannot edit this email. This feature is available if Maximizer's email service is running.
- To keep the appointment details private, select the **Private Appointment** checkbox. When this option is selected, even those with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the activity displayed as "Private Activity".
- Select the meeting attendees by double-clicking on a user's name or by selecting the user and clicking the **Assign** button. Check the **Notify Others** checkbox if you want a dialog box to immediately appear reminding the other attendees of the meeting; they'll have the option of accepting or declining the meeting and their responses will appear in the Appointment dialog box.
- If you assign Ask or Always to the **Email appointment notification** option on your **Preferences > Calendar/ Hotlist** tab, you, the selected users, and the associated Address Book entry will receive an email when you schedule, modify (including adding or removing attendees), or delete appointments. The Compose Email Message dialog box opens displaying the basic appointment details and allowing you to edit the email.
- To set a priority for this appointment, set a value in the **Priority** drop-down list.
- You can check the **Task is Completed** checkbox to immediately record the appointment as a completed appointment.

3 Click OK.



Note that automatic email notification does not occur when you are using applications other than Maximizer, such as MaxAlarm, Maximizer Outlook Calendar Integration, and Employee Portal, to add, modify, or delete appointments.

Check Your Co-workers Status with the Peg Board

In a medium to large office, it's not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer's calendar to show you each user's current status.

➤ To view the Peg Board

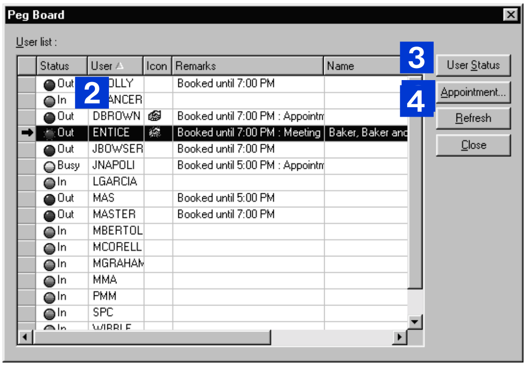
1 Select **View > Peg Board**.

2 The status indicators denote if a user is busy or not. When a user creates an appointment, the **Sign out of Peg Board** option must be selected so the Peg Board is updated.

3 To override the calendar status, you can click on the **User Status** button to manually set a user's status.

4 You can also see other users' busy periods if they have allowed you to view their calendars (**File > Preferences > Calendar/**

Hotlist tab). If a user has allowed others to view their calendar, you can click here to view the details of the user's appointment.



Check the Time in Other Cities Using the World Clock

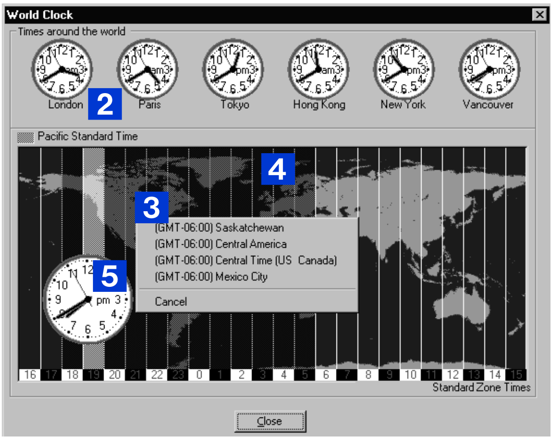
The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

➤ To use the World Clock

1. Select **Tools > World Clock**.
2. To select a time zone, right-click on one of **clocks**.
3. To view time zone information, click in the corresponding area of the **world map**.
4. The shaded area indicates night time. Right-click to turn the **show night** option on or off.

5 Click on any time zone in the world map to view the time in the **large clock**.



Share Your Files in the Company Library

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

The Company Library window is divided into two panes: the left pane is a tree view, which displays the folders and files in your library; the right pane is a preview area, in which you see a preview of certain file types or type text notes.

➤ To share files in the Company Library

1 Use the toolbar for common tasks, like **Open File**, **Save Note**, **Close Note**, **Find**, and **Preview**.

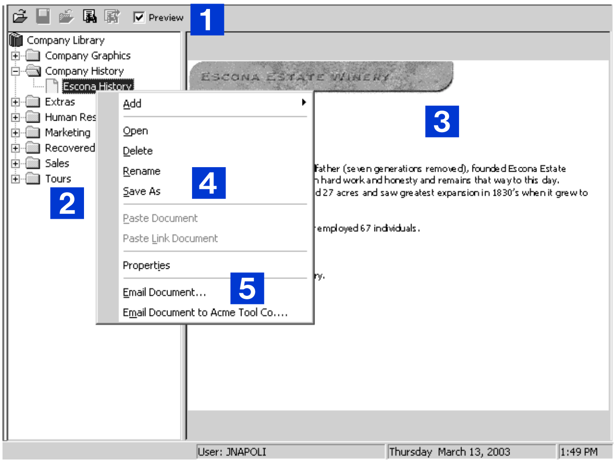
2 The area in the left side of the window lists your folders and files in a **tree view**—much like Windows Explorer.

3 The area in the right side of the window displays a preview of most file types. You can also view and edit notes here.

Uncheck the **Preview** checkbox to display an icon rather than a preview.

4 Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.

5 Email your document by right-clicking on the file and choosing **Email Document** or **Email Document to [current entry]**.



? Press F1 in the Company Library window for more help.

The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add files, folders, and notes as either private or public entries. If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email.

The easiest way to add an item to the Company Library is to right-click on the folder where you wish to place the new item, and select Add from the right-click menu. You then choose which type of item to add to the folder:

- **Document** – select this to add a file. The file doesn't have to be a document, but the preview only works for documents.
- **Note** – select this to add a text-only document that you can write and edit in the preview pane.
- **Folder** – select this to add a new folder.

You can either create a new file using the associated application, or you can browse for an existing file on your hard disk drive or network. If you browse for a file, you can choose to either "link" or "embed" the file in the Company Library. Embedding is usually a better choice, as a link is only a "shortcut" to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

The following document types are supported in the Company Library:

- Company Library notes
- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Microsoft PowerPoint (.pps)
- Tiff files (.tif)
- JPG files (.jpg)
- Windows Bitmaps (.bmp)
- GIF 87a and 89a (.gif)
- Text files (.txt)
- Internet Shortcuts (.url)
- Maximizer Documents (.mxd)
- Adobe Acrobat (.pdf)
- Outlook Email (.msg)

Make Entries in Your Journal

The Journal window provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to an Address Book entry.

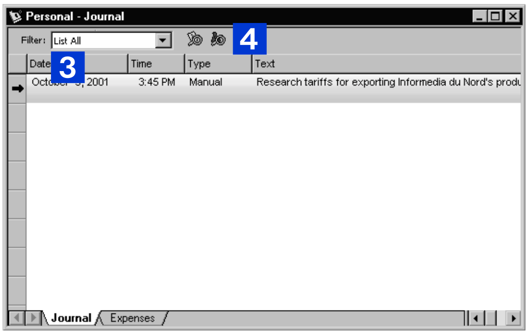
If you always want a journal entry to appear at the top of the list in the Journal window, type or select a date that is a few years in the future.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries, and search most Maximizer note types from the Journal window, if you choose the Journal or Both options on the File > Users > [user ID] > Preferences > Logging tab.

➤ To use the Journal window

1. Select **Window > Journal**.
2. Right-click and choose **Add Journal Note**.
3. Filter your journal entries by selecting one of the following items from the view filter—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
4. To search for a note by date range or text, click the corresponding **search icon**.



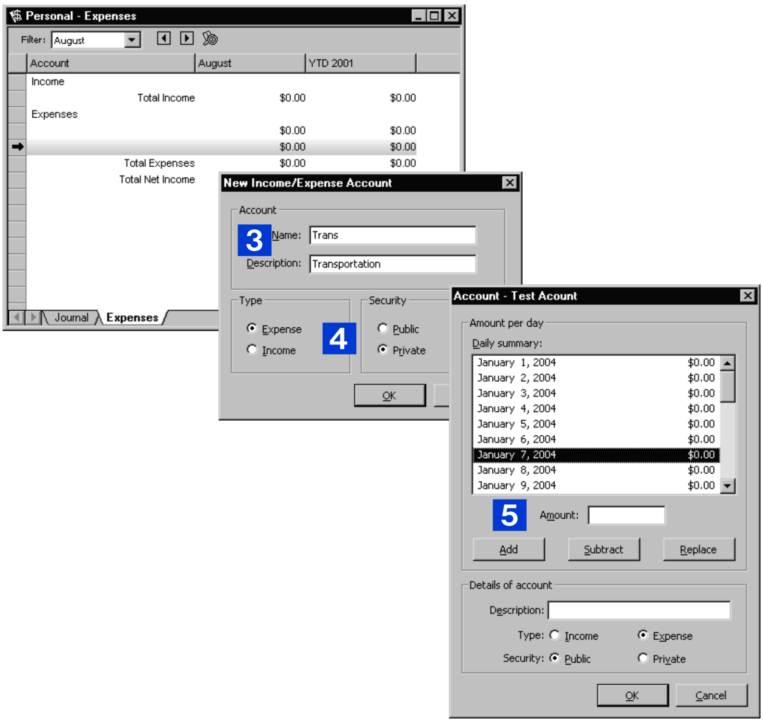
Monitor Income and Expenses

ⓘ Expense/income entries cannot be imported from another Address Book.

Use the Expenses window to record your income and expense items in separate accounts.

➤ To use the Expenses window

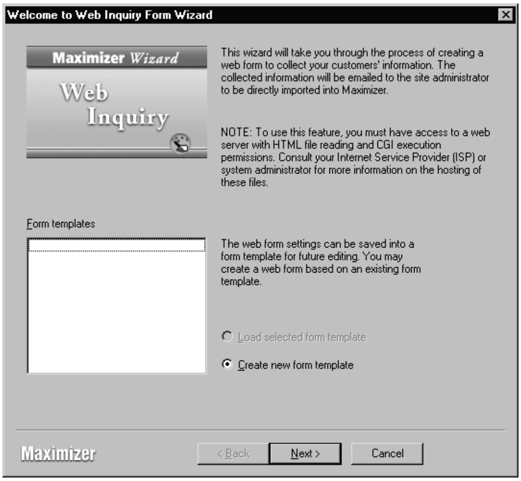
1. Select **Window > Expenses**.
2. Right-click and choose **Add Account**.
3. Type a **name** and **description** for the entry.
4. Choose to make it an **expense** or **income**. You can mark the entry as Public if you want others to see the entry.
5. Then open the account, choose the **day** to which the expense or income applies (the current day is the default), enter the dollar amount and choose to add, subtract, or replace the amount.



Create Web Inquiry Forms for Your Website

Wizard button on Standard toolbar.

Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is emailed to your website administrator—or whatever email address(es) you specify—where it can be imported directly into Maximizer as Address Book entries.



Use the Web Inquiry Form wizard to create "data collection" forms for your website.

Using Maximizer's Web Inquiry Form wizard, you can:

- Save the web form settings as a **template** for future editing, so you can customize the form as the need arises.
- Select the **Maximizer fields**, including user-defined fields, you want to appear on the form. Information entered in the form's Last Name field, for example, is inserted into the Last Name field when importing information into Maximizer. If you have chosen a table user-defined field, a drop-down list is automatically created so customers can select available choices.
- Change **displayed field names**. For example, if you want to include in the form an existing Maximizer user-defined field called "GIC Heard About", you can choose to display a helpful label such as "How did you hear about our GIC program?".
- Designate **mandatory fields**, in addition to the last name and email address fields. If information is not entered in these mandatory fields, the customer will be notified via a Failure page.
- Create **rules to manage** when collected information is emailed to the website administrator (or whatever other email addresses you specify).

- Use HTML to customize the look of the areas above and below the **web form**; the look of the form itself cannot be customized.
- Use HTML to customize the **Success page** and the areas above and below the **Failure page**.
- **Preview** the web form and return to the respective wizard screens to make the required adjustments.

Maximizer Web Form Requirements

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the "winqcgi.pl" file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

<FORM action="winqcgi.pl" method="post" name="mtiform">

to

<FORM action="/cgi-bin/winqcgi.pl" method="post" name="mtiform">

CHAPTER 4

Communicating with Your Customers

Communicate with Your Customers

In this chapter...

Keep in Touch with Your Customers

? For more information on using the Maximizer Word Processor and the Documents window, see the Maximizer online Help.

Maximizer makes it easy to maintain good communication with your customers. You can send email, letters, and faxes to any of your Address Book entries. When you want to make a phone call, Maximizer will show you the number you need to dial, or if you have a modem, Maximizer can dial the number for you. Any communications—via mail, the Internet, or telephone—can be logged and tracked in Maximizer.

The Email window works with many popular email service provider applications, such as Microsoft Outlook and others. This means that if you already use one of these service providers, you have access to the powerful email features in Maximizer.

You can make a phone call from Maximizer by selecting the Address Book entry you want to phone and clicking the Phone button in the toolbar. As you make the call, Maximizer lets you keep notes on your conversation as it's happening.

With the Documents window, you can keep any documents or files you send to the Address Book entry, or store any file that is somehow related to your activities with the Address Book entry.

If you prefer to use another word processor, Maximizer integrates with both Microsoft Word and Corel WordPerfect.

Design Templates and Write Documents

The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly-used word processors. You can use the Maximizer Word Processor to create documents and document templates.

➤ To write a document

1. Launch the Maximizer Word Processor in any of the following ways:

- Select an **Address Book entry** and click the **Letter** button. To write a fax, select Write a Fax from the Actions menu.
- Drag an **Address Book entry** to the **Documents** window
- Click the **Editor** icon on the Standard Toolbar
- Press **F8**
- From the **Tools** menu, select **Maximizer Word Processor**

2. Select **File > New**. You can create the document based on the word processor's fax, invoice, letter, and memo templates, or use

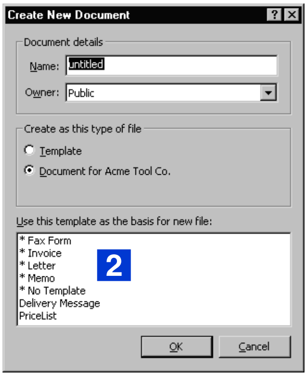
these templates as a base for your custom templates. You can enter the document's name now or enter it when you are saving the document.

3 Use the **toolbars** for common tasks and formatting text and paragraphs.

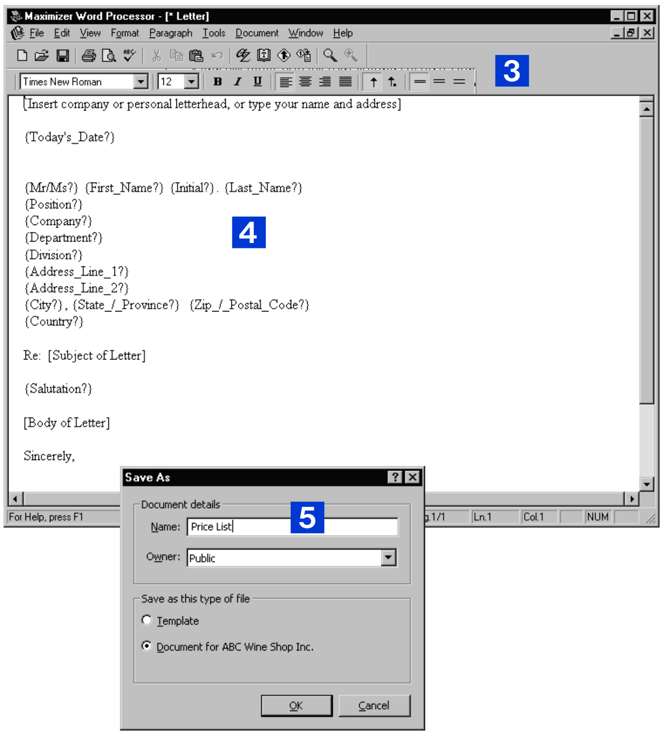
4 If your template has **merge fields**, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.

5 When you are finished, select **File > Save As** and enter a name for the document. You can also specify the owner of the document and choose whether to save it as a template. If you've already specified the name, select File > Save.

To run a spell check, with the document or template open in the Maximizer Word Processor, place your cursor at the top of the page, and then select Tools > Spell Check or click the Spell Check button on the toolbar.



In this sample letter, the template includes merge fields and markers to show where to type the body of the letter.



Understanding Templates and Documents

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document with merge fields and then selecting "Template" when you save your work. When you next create a new document, you can use your saved template as the basis for the document.

Documents

A Maximizer Word Processor document is always specific to an Address Book entry, customer service case, campaign, or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

Location of Templates and Documents

When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the SQL or Pervasive database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

Using Corel WordPerfect

You can use WordPerfect as your Maximizer word processor; ensure WordPerfect is installed prior to installing Maximizer.

During your Maximizer installation: choose the Custom installation option, select the listed Maximizer option, click the Change button,

and then select the "Maximizer WordPerfect Assistant/Templates" options.

Using Microsoft Word

You can use Word as your Maximizer word processor; ensure Word is installed prior to installing Maximizer.

Maximizer Macro Security Setting

While some of your personal macros may require a “medium” security setting to run, Maximizer macros can operate in Word with a “high” security setting. To adjust your macro security setting, go to Tools > Macro > Security and make your selection in the Security Level tab.

After installing Maximizer, and the first time you open Word, you will be prompted to trust the Maximizer macros. Simply select the “Always trust macros from this source” option and click the Enable Macros button; the dialog box will not appear again.

“Freezing” Merge Fields in Word

In addition to using templates from the Maximizer Word Processor, Maximizer templates can be accessed from the Maximizer tab of Word’s File > New menu. The links between Maximizer fields and the corresponding fields in Word documents are dynamic, which means the document information will change depending on what Address Book entry is selected. This is only an issue if the Word document recipient is a Maximizer user who opens the document with a different Address Book entry selected; in this situation, the document’s merged field values then change to those of the highlighted entry.

➤ To insert a file in the Documents window

- Click the **entry** to which you want to attach a file. Select **Insert File** from the Edit or right-click menu.

Use Merge Fields in a Document Template

Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First Name?}

When you perform the merge, the name of each recipient will display in place of the merge field. If the entry doesn't have an assigned value for the chosen merge field, the field does not display.

Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information, opportunities, and customer service cases as well.

➤ To insert a merge field

1. With a document open in the Maximizer Word Processor, place your cursor where you want to insert a merge field.
2. Select **Merge Field** from the Maximizer Word Processor Tools menu, or click the **Merge Field** button on the toolbar.
3. In the **Insert Merge Field** dialog box, select the type of merge field you would like to insert.
4. Select a merge field from the list and click the **Insert** button. The selected merge field is inserted in the template.
5. Select the **Blank if Not Used** checkbox if you prefer. During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)
6. Repeat steps 3-5 for each merge field you want to add.

7 When you are finished, click the **Close** button.

Send “Broadcast” Documents Using Mail Merge

If you wish to send a letter, an email, or a fax to many recipients, the Maximizer Word Processor’s mail merge is the tool to use. The merge feature allows you to send a single document to multiple Address Book or Contact entries via fax, email, or regular mail. This type of merge is called a “broadcast” merge.

To find out how to insert merge fields into a template, see “Market with an Automated Campaign” on page 103.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient’s information when you perform the merge and send the document.

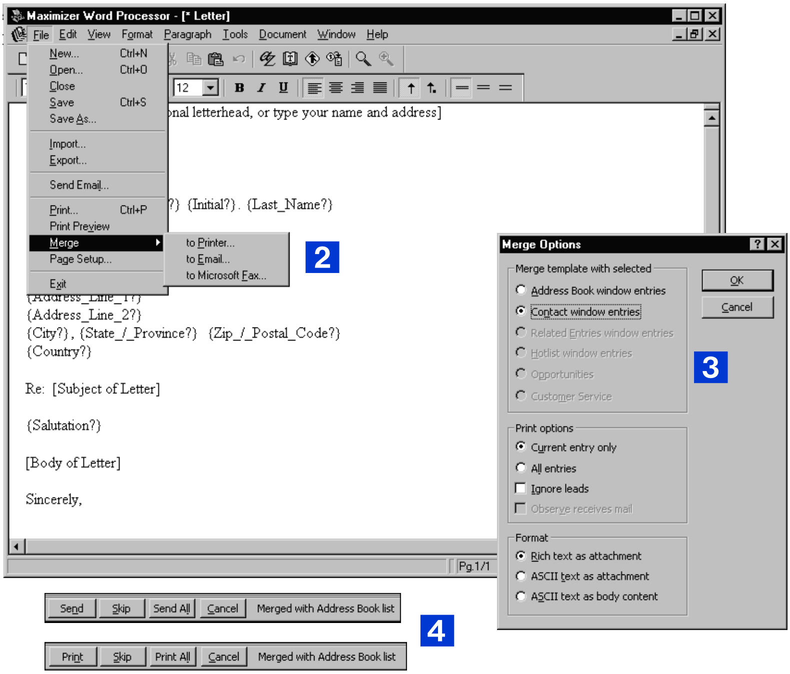
➤ To send a mail merge

1 To send a document in a broadcast merge, you first create a **list** of Address Book entries that should receive your merged document. You can do this by performing a search for the appropriate entries or simply selecting entries in your current list.

2 Select **File > Merge > to Printer**, to **Email**, or to **Microsoft Fax**.

3 Specify your merge options. Depending on what window you have active, the available merge entries vary. Click **OK** to continue with the merge.

4 Choose **Print** or **Send** to merge the document with the first entry in your selected list of entries, or choose **Send All** or **Print All** to merge the document with all of your selected entries. Click the **Skip** button to go on to the next entry.



Set Up Maximizer to Use Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any Extended MAPI email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or VIM (Vendor Independent Messaging) email client. Email clients that should work with Maximizer when properly configured include those listed below.

- Lotus cc:Mail, versions 8.0, 8.1
- Lotus Mail, version 4.52
- Lotus Notes/Domino, version 4.6
- Microsoft Exchange, versions 4.0, 5.01, 5.5, 2000, 2003
- Microsoft Outlook 98/2000/2002/2003
- Microsoft Outlook Express (simple MAPI), versions 5.0, 5.5, 6.0
- Microsoft Windows Messaging, version 4.0
- Novell GroupWise, version 5.5 (excluding remote)
- Netscape Messenger, versions 4.6x, 4.7

Please see the Maximizer website at www.maximizer.com for the latest version information of compatible email programs.

Using Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in Maximizer's Advanced Email Preferences (File > Preferences > Email tab). If you do not select the correct option, a program fault error will occur when using the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in the File > Preferences > Email tab.

Using Microsoft Exchange

If you are using a version of Microsoft Exchange prior to 5.0 and you have the "Read messages using email service provider's editor" option selected in Email Preferences, the Reply, Reply All, Forward, Previous and Next buttons will not work when you open a message in the Maximizer Email window. Upgrading to Microsoft Exchange 5.0 or higher fixes this problem.

Using Microsoft Outlook Express

Because Outlook Express is a Simple MAPI program, the Maximizer Email window shows the contents of the Outlook Express Inbox only. To use Outlook Express with Maximizer, you must configure settings

in both Maximizer and Outlook Express, as described in the following procedures.

➤ Step 1: To Configure Maximizer for Outlook Express 6.x

1. Start Maximizer. If necessary, open the **Address Book** you use.
2. Select **File** > **Preferences**.
3. Select the **Email** tab.
4. Enable the **Override extended MAPI** option.
5. Click **Advanced**.
6. Select **Other email system** and click **OK**.
7. Click **OK** to close the Preferences window.
8. Close Maximizer.

➤ Step 2: To Configure Outlook Express 6.x for Maximizer

1. Start Outlook Express.
2. Select **Tools** > **Options**.
3. On the General tab, click the **Make Default** button beside **This application is NOT the default Mail handler**.

   If the button is unavailable, and the option says **This application is the default Mail handler**, then you can proceed to the next step because Outlook Express is already the default Mail handler.
4. Click **Apply**, and then click **OK**.

   Windows may prompt you to restart your computer.

   Maximizer is now integrated with Outlook Express.

Using Microsoft Outlook

ⓘ In Outlook, the default installation type is Internet Mail Only. Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. You must switch the installation type from Internet Mail Only to Corporate or Workgroup.

Outlook 2003, Outlook 2002, Outlook 2000, and Outlook 98 are Extended MAPI programs. This means the Maximizer Email window will show the same folders as Outlook.

➤ To use Outlook with Maximizer

1. In Maximizer, select **File** > **Preferences**.
2. Select the **Email** tab.
3. Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
4. Click **Advanced** and select **Other Email System**. Click **OK**.
5. Click **Apply**, then **OK**.
6. Exit Maximizer.
7. Restart Maximizer.

When you select the Email window (Window > Email), folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders are displayed.

Setting Up Automatic Dialing

ⓘ If your modem can dial out in other applications, then you can use your modem in Maximizer.

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem using the Preferences dialog box in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all; but if you set up your baud rate incorrectly, the modem will operate, but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application. In Windows 98 or NT, TAPI is the recommended option.

➤ To configure your modem in Maximizer

1. Select **File** > **Preferences**.
2. In the **Dialing** tab, select **Modem** or **TAPI**.
3. If you selected **TAPI**, click the **Properties** button to configure the dialing properties for the modem, and click the **Device** button to configure the Device properties for the modem.

   – or –

? For a list of each control and how to fill in the field, press F1 while in the Dialing tab.

If you selected **Modem**, fill in the remaining fields.

4 Click **OK**.

Your modem is now ready for use in Maximizer. For more information on dialing with your modem, see the Maximizer online help.

Send and Receive Email

Maximizer's Email window provides you with the ability to send and receive email using your existing email system. You can email Address Book entries directly from Maximizer's main windows.

➤ To send and receive email

1 Click the **Deliver Now** button in the Email window to immediately deliver new emails.

2 To search your inbox for a specific email subject, select **Custom** from the Subject field.

3 In any of the Maximizer main windows except the Email window:

To send an email to *one* selected Address Book entry, use the **Email** button.

–or–

To send an email to *multiple* selected Address Book entries, select **Send Email** from the File menu.

In the Email window, click the **Compose** button.

If you wish to send an email to more than 1,000 entries at a time, you must choose to send the entries separately or select the entries in several groups of 999 or less.

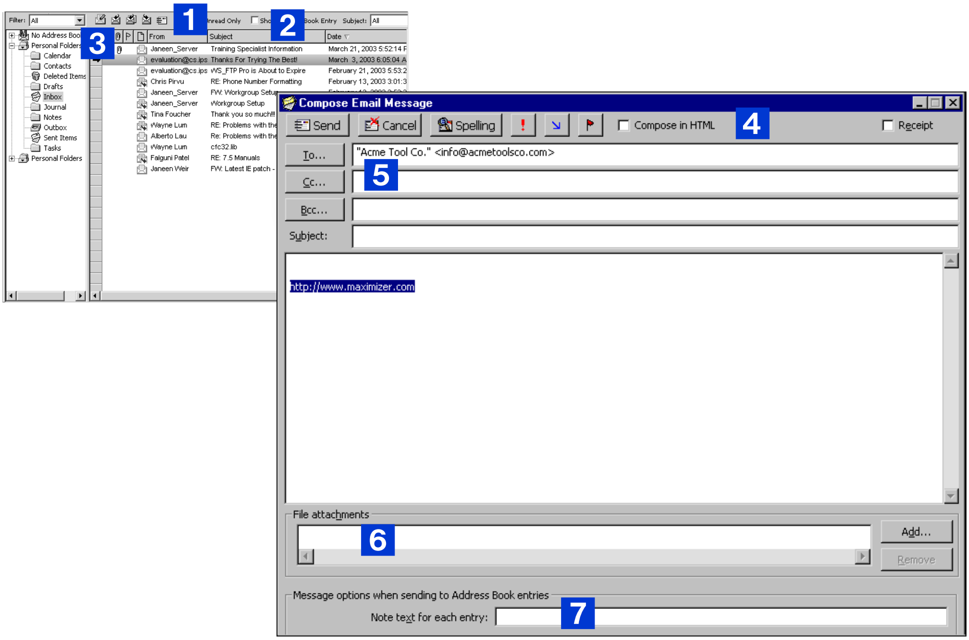
4 In the Compose Email Message dialog box, use the **Compose in HTML** option to format an email as HTML.

5 Use the To, Cc, and Bcc buttons to select the **recipients** of the email. If you are sending out an email to a single recipient, you have the option of choosing a **Maximizer Address Book entry** or an **Outlook** contact.

6 The Email window supports any type of file attachment. To send a file by email click the **Add** button under "File Attachments" in the Compose Email Message dialog box.

7 When sending email in Maximizer, you can type a note that will be added to each Address Book entry recipient. To use this

functionality, note logging for email must be enabled in logging preferences.



When the Override Extended MAPI option is selected in the Preferences > Email tab, the F5 key also initiates the Deliver Now command. For information about the Extended MAPI option and the Email window in general, press F1 in the Email window.

To send emails to Address Book entries or users when scheduling appointments, see “Add a New Appointment to Your Calendar” on page 48.

Integrate the Calendar with Microsoft Outlook

You can integrate Microsoft Outlook calendar changes with the Maximizer calendar. The integration is a two-way process—you can send information from Outlook to Maximizer and vice versa.

The Outlook integration options are available when Outlook is installed on the same computer as Maximizer. The installation of Outlook is auto-detected during the installation of Maximizer.

When you use either integration option, the appointment details such as the associated contact or company name and attendees list appear in both applications.

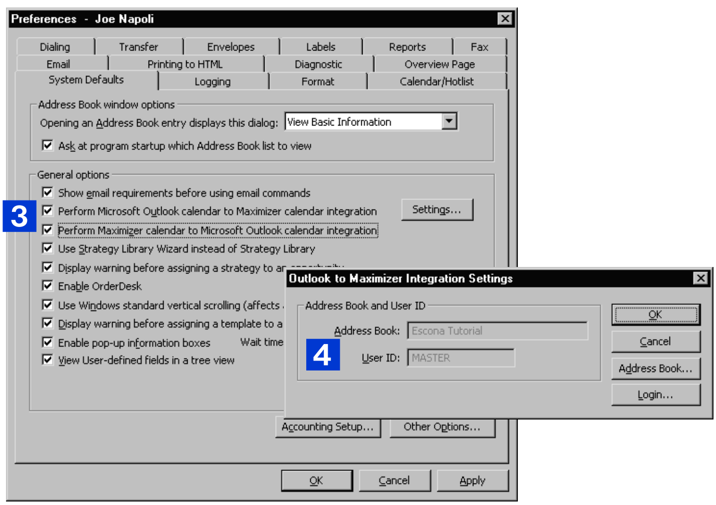
➤ To integrate Microsoft Outlook with Maximizer

1. Before you can synchronize your contacts with Outlook, you must first create a **Contact folder** named **Maximizer Contacts** in Outlook (**File > New > Folder**) making sure you choose **Contact Items** from the **Folder contains** drop-down list. Then, **restart** Maximizer to access this folder from the Compose Email dialog box.

2. Select **File > Preferences**.

3. On the **System Defaults** tab, select either or both of the following options:
   - Perform Microsoft Outlook calendar to Maximizer calendar integration
   - Perform Maximizer calendar to Microsoft Outlook calendar integration

4. When you choose the **Outlook to Maximizer integration** option, you are then prompted to set the target Address Book with which the Microsoft Outlook calendar is to synchronize. Click the Address Book button to select the Address Book. You will also need to enter your User ID and password after selecting the Address Book.



Keep a Record of Your Telephone Calls

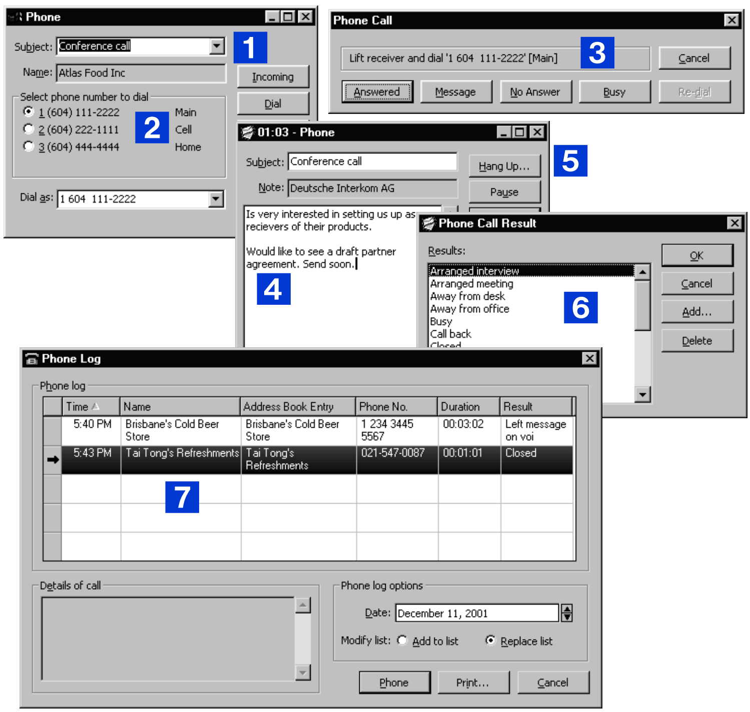
You can log incoming calls as well as outgoing calls. When you answer your phone, select the entry for the person who is calling and select Actions > Receive a Call. You can also press Alt + F7 to record an incoming call.

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activity in the Phone Log.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

➤ To phone a Company, Individual, or Contact

1. Select or **type** a **subject** for your phone call.
2. Choose the **number** to dial.
3. After you click **Dial**, choose the response in this dialog box.
4. Keep **notes** on your call as you talk.
5. Click the **Hang Up** button when you are finished.
6. Record the **result** of the outgoing or incoming call. Add or delete a result.
7. To view the details of calls you made, access the **Phone Log** from the View menu.



CHAPTER 5

Managing Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

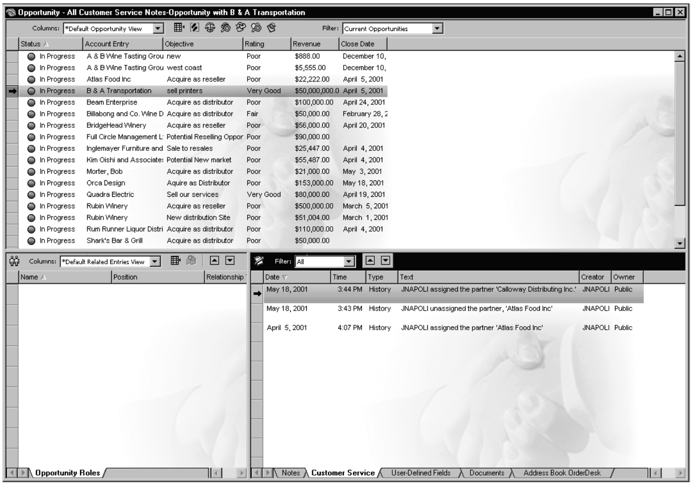
Organize Your Sales with Opportunity Management

Your system administrator uses the Administrator module to set up sales and marketing teams.

Opportunity management helps you and your colleagues manage complex sales. Complex sales involve the participation of more than one person in the buying decision and require the support of a sales team. Prospects for complex sales can range from single businesses to multiple corporations or governments.

Keep the following points in mind when working with the Opportunity window:

- Use the **view bar** buttons for common opportunity tasks.
- Use the **view filter** to show all opportunities, team updated opportunities, or current opportunities.
- Double-click an **opportunity** to view or modify it.
- The **following windows** show additional information for the selected opportunity.
- Maximizer automatically creates **notes** to record opportunity activity.



Using opportunities in Maximizer, you can:

- Create strategies—detailed plans that identify the factors that influence a sale and the activities you must perform to close the opportunity.
- Apply these strategies to opportunities.
- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all the right people in your organization have up-to-date information about the status of your opportunities.

- Forecast the probability of successfully closing your opportunities.
- Analyze the effectiveness of your strategies and create new ones for new opportunities.

In short, Maximizer helps you define and strengthen your selling methodology. Your sales team can define a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then apply this strategy to opportunities.

Design Strategies for Your Opportunities

The Maximizer Training Guide offers step-by-step exercises that help you learn how to make your own strategies and use them in opportunities.

Opportunities allow you to pursue structured sales opportunities in a team environment. An opportunity is created using one of the strategies in the Strategy Library. Strategies are approaches that your organization uses in a sales opportunity. Before you learn how to create an opportunity for your company, familiarize yourself with the following terms:

- **Strategy** – A strategy is a detailed plan that defines the procedures that contribute to a successful sale or other-sales related goal. A strategy is composed of steps, which are in turn composed of scheduled activities.
- **Steps** – Steps are milestones in the opportunity that reflect actions you should take when pursuing an opportunity. Each step represents one or more activities.
- **Activities** – Activities are actions that form the smallest building block in an opportunity. Once a step is started, each activity is turned into a scheduled Hotlist task in Maximizer.
- **Roles** – Roles are the known influences caused by people that affect the probability of selling your product or service. For placing an ad, one of the roles would be your contact person at the magazine.
- **Success Factors** – By creating success factors in the Strategy Library, you can monitor the effects of specific influences on opportunities. You can include an unlimited number of success factors in a strategy. Two success factors are predefined: “On Schedule” and “Political Alignment”. Other examples of success factors include “Product Need”, “Feature Set”, and “Cost”.

A strategy must be a detailed plan that defines the procedures that contribute to a successful opportunity. You may be familiar with your organization’s different sales strategies, or you may need to spend some time defining or fine-tuning them. In either case, creating strategies involves three important processes:

- Gathering information to define your strategy

- Entering your strategy in the Strategy Library
- Testing your strategy

By carefully working through these processes, you are defining the strategies that work in your organization. Once you create a strategy in the Strategy Library, you can apply the strategy's particular sales plan to any new opportunity that you create in Maximizer.

Plan a Strategy on Paper

Before you can enter your organization's sales strategies, you need to gather information from your sales people. The best strategies combine the knowledge and experience of everyone in your organization; therefore, you should involve as many people in this process as possible. The result will be a pattern of success that you can follow like a road map.

Your first step is to design a general plan—a strategy—that describes your company's steps, activities, roles, and success factors involved in closing the sale. The most difficult step in creating a new strategy is the planning stage. Once you know what the steps, activities, roles, and success factors will be, you may then enter the information in the Strategy Library.

On paper, try defining the following elements:

- Strategy steps. A step is a high-level action, such as "Demonstrate the product".
- Activities that compose each step. An activity is the most basic building block—it is an individual task needed to complete the step.
- Success factors. The success factors assess the factors that influence whether or not your opportunity will succeed. An example might be "Business relationship".
- Strategy roles. A role can be any person who influences the progress of an opportunity, such as the contact responsible for making purchases.

When you have finished planning your strategy on paper, enter your new strategy in the Strategy Library.

Break Steps into Activities

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a strategy that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to sales team members.

For instance, in the case of selling a waterfront home, your steps could be broken down as follows:

1. Show home
   - Call seller for appointment
   - Call buyer and confirm time
   - Meet buyer at home and show it
2. Pre-qualify Financing
   - Interview purchaser to obtain financial information
   - Send information to financial institution representative
3. Write and Present Offer
   - Interview purchaser about items they want to include in the offer
   - Fill in Multiple Listing form
   - Present offer to seller
4. Close Deal
   - Coordinate closing documents with lawyers for buyer and seller
   - Transfer keys

Each activity is assigned to a single user or delegated to a sales team member as a Hotlist task. As the team members mark activities as complete, Maximizer updates the status of the opportunity accordingly.

The Strategy Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select from a list of available activities.

Define the Strategy Roles

The next step in developing your strategy is to determine the key roles—positions assumed by key people that will directly influence the outcome of an opportunity that is assigned to this strategy.

When you are defining a strategy, you don’t necessarily know who will fill these roles for each opportunity. If you can define generic roles for your strategies—for instance, Mortgage Loan Officer and Buyer—you can later use people’s names for those generic roles for individual opportunities.

Define Strategy Success Factors

Strategies include influences called success factors. Choose success factors with care—they are used to estimate the probability of a successful outcome of an opportunity. Success factors should be defined based on the experience of your sales people. After choosing a success factor, you also assign a weight to the success factor based on your assessment of importance. Success factor definitions let Maximizer tell you how the opportunity is progressing and how you can improve your probability of success. Once you've defined a success factor, you can use it in any number of different strategies.

Maximizer includes two success factors:

- **Political Alignment** – The Political Alignment measures the impact of the key people who can influence the outcome of an opportunity.
- **On Schedule** – Maximizer uses this success factor to determine whether an opportunity is ahead or behind schedule.

These two factors, along with the others that you define, must be weighted according to their importance in pursuing the opportunity. You can't delete the predetermined success factors—if these success factors have no significance, assign the success factors a weight of zero, or don't assign it to the strategy.

Enter Your Strategy in the Strategy Library

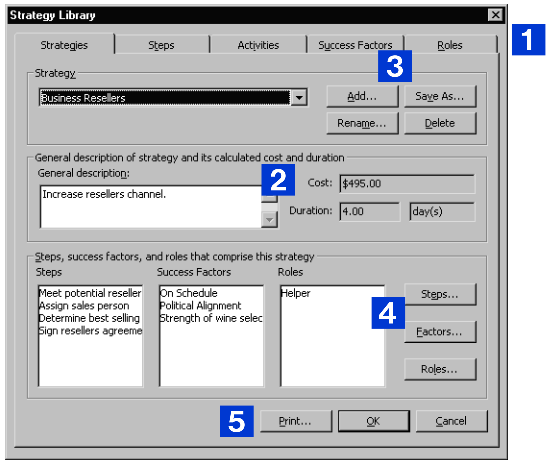
? For more detailed instruction, open the Maximizer online help, and look up "Strategy Library". Or, click the Wizard button on your Standard toolbar and run the Add Strategy wizard.

Once you have your strategy planned on paper, entering it into Maximizer is easy. The Strategy Library is a tabbed dialog box in which you can create a library of roles, success factors, activities, and steps. You use these elements when you add a new strategy to the library.

➤ To define a strategy

1. Each tab lets you construct a different strategy element. Start with the **Roles** tab and finish with the **Steps** tab before you construct your strategy in the Strategies tab. These elements are then selected and assembled into your new strategy.
2. **Cost** and **duration** are automatically calculated from the cost and effort of the component activities.
3. Use these buttons to add, **copy** (Save As), **rename**, or **delete** strategies.
4. When you're ready to put together the strategy, click a button to begin adding **steps**, **factors**, and **roles** to your new strategy.

5 Click the **Print** button to print the selected strategy.



After you have designed a strategy, you can apply it to any new opportunity you create.

Pursue a Sales Opportunity

ⓘ You can record opportunities without a strategy, if you wish. Specify "Not using a strategy" in the opportunity's Strategy tab.

If you have planned and entered your strategy correctly, it's an easy matter to implement an opportunity using any strategy in your Strategy Library. You enter new opportunities by selecting an Address Book entry in the Address Book window and adding the new opportunity in the Opportunities window. All opportunities have an associated Address Book entry.

➤ To add an opportunity

1 Select the **Address Book entry** to which you want to add an opportunity. If you select a Contact, Maximizer adds the opportunity to the Company.

2 Drag and drop the Address Book entry or Contact to the **Opportunities icon**. You can also select Add Opportunity from the Edit menu or click Insert. A new opportunity dialog box opens.

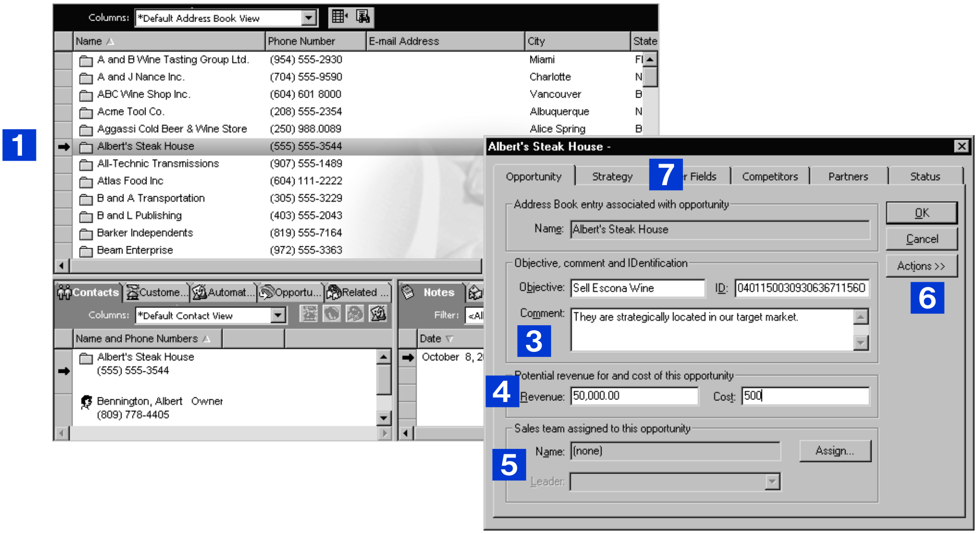
3 The **objective** and **comment** fields should describe the goal of this opportunity.

4 Enter the opportunity's **potential revenue**. You can change this amount later, if you need to. "Cost" is automatically calculated from the total cost of the activities in the strategy.

5 Choose the **team** (or **user**) that should work this opportunity. You can make modifications to the team members for each opportunity.

6 You can perform common tasks by clicking the **Actions >>** button from any of the opportunity dialog box tabs.

7 Work through the remaining tabs from left to right, entering the opportunity's details.



Use the opportunity dialog box to enter an opportunity's details, including: objective, potential revenue, sales team assigned, strategy, user-defined fields, competitors, partners, and status.

Make it a Team Effort

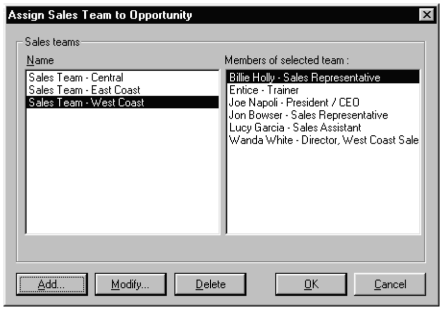
Maximizer offers you the ability to assign an opportunity to any sales team your system administrator has set up in Administrator. Teams allow you to delegate individual activities of the opportunity to members of the team. These activities appear in the team member's Hotlist for completion by the scheduled time.

Sales Team Members

Sales teams are set up in Administrator. For more details, see the Maximizer Administrator's Guide or Administrator's online Help.

- **Team Leader** – In a team, one person is designated as a team leader who has the right to make changes to the opportunity as well as the opportunity's team.

- **Team Member** – A regular team member does not have the right to change the opportunity nor the team. The member's role is to perform the tasks the team leader assigns.
- **Team Member with Edit Rights** – In Maximizer, the team leader can grant any member the right to edit the opportunity, which essentially gives the same abilities of the team leader. This right must be granted on a per-opportunity basis, unless your system administrator specifies otherwise.



Click the Assign button in the opportunity tab to view or change a team's membership for the current opportunity.

Delegate an Opportunity's Activities

? To find out how to delegate tasks to your team members, open Maximizer online Help and look up "sales, team members" in the index.

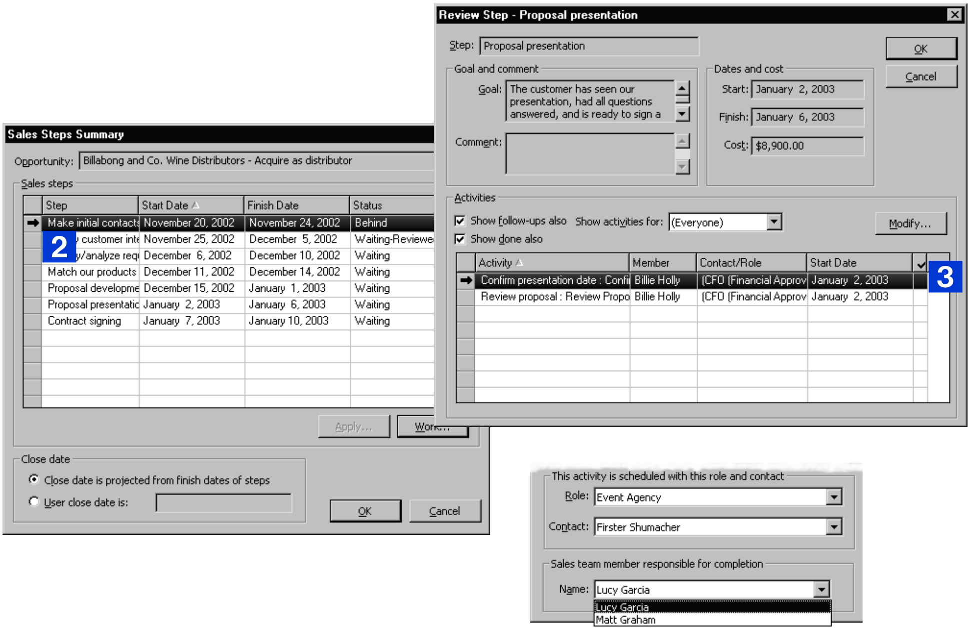
If you are working on an opportunity with a sales team as a team manager or a member with edit rights, you have the ability to delegate the opportunity's activities to individual members in the team. You can modify the team's membership or member's rights at any time. After you assign a team to work on an opportunity, you can then delegate activities and modify the team.

You may have some steps in your opportunity that are appropriate for team members with particular skills. The editing of an agreement document, for example, might fall to your writer.

➤ To delegate an opportunity activity

1. From the View menu, select **Sales Steps Summary**.
2. Select a **step** that contains an activity you want to delegate and click **Review**.
3. With the activity selected, click the **Modify** button or double-click the activity you want to delegate.

4 Select the **team member** to whom you are delegating the activity and click OK to finish.



After you have delegated the tasks to sales team members, you can begin working through the steps of your opportunity and marking each Hotlist task as complete.

Apply and Work the Steps to Close the Sale

? For additional help, press F1 in the Sales Steps Summary dialog box or the Work Step dialog box.

Once you have assigned responsibility for activities to sales team members, you must apply the opportunity steps, scheduling the activities for completion. Applying the step initiates the step's activities—the assigned activities appear as tasks in the team member's Hotlist. Members of the sales team can carry out the activities they are responsible for and mark them as complete in their Hotlists.

➤ To work steps

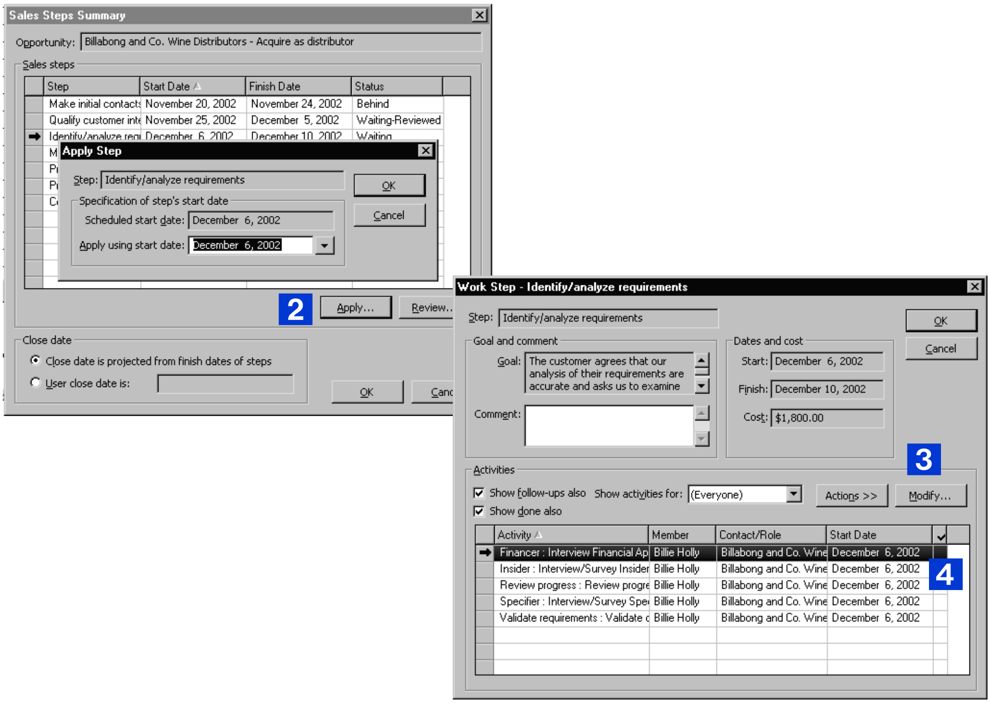
1 Click the **Apply** button to initiate a step.

2 After applying a step, the Review button becomes Work. Double-click the step or click the **Work** button to open the Work Step dialog box.

3 Select an activity and click **Modify** to view, change or delegate an activity.

4 Double-click this **column** to mark an activity as complete. You may also do this in your Hotlist.

5 Use the **Actions >>** button to perform common tasks associated with the opportunity.



You can begin the process of working through each of the steps in the opportunity's strategy. Working through the steps is a simple process. Using the Sales Steps Summary dialog box, apply a step. Then use the Work button to mark each task as complete. Alternatively, you can mark each step as complete in the Hotlist window—the result is the same. When all activities in a step are marked "checked" in the Work Step dialog box, the step has a "Completed" status in the Sales Steps Summary dialog box, and you can continue with the next step.

CHAPTER 6

Managing Campaigns

Market Your Products and Services

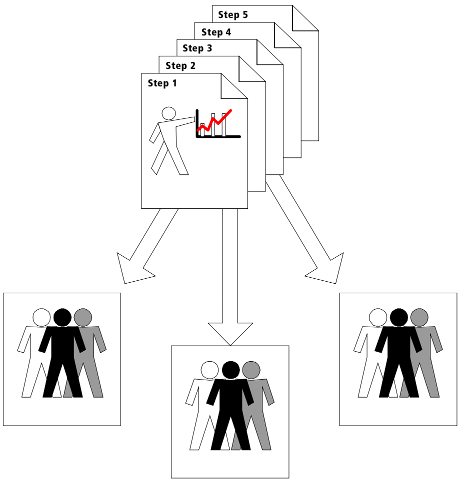
In this chapter...

What are Campaigns?

Campaigns help you and your colleagues to promote your company and to manage complex marketing campaigns.

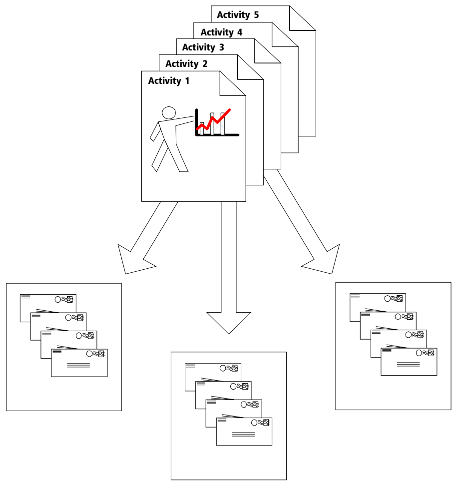
Through the use of Automated campaigns, you can broadcast your marketing message to anyone in your Maximizer Address Book. A campaign can reach out to your entire Address Book or to a single person via email, fax, or print.

Other marketing efforts require you to coordinate your marketing team for a common goal—producing an ad in television, radio, or print, for example.



Traditional Campaign Template

A Traditional campaign template provides a strategy for your teams that can be reused many times for various marketing campaigns.



Automated Campaign Template

You can send out Automated campaign message via email, fax, or printed document. An Automated campaign template defines when **and** what **is sent and can be reused for many Automated campaigns.**

In short, tracking campaigns help you define and strengthen your marketing methodology. Your marketing team can define a campaign template—what you need to do to launch a marketing campaign and how you will address the issues and obstacles involved—and then apply this campaign template to your campaign.

Campaign Window

? Press F1 in any window or dialog box for help.

Like the Address Book window, the Campaigns window is list-based, which means your entries are displayed as items in a list.

Work with the Campaigns Window

All of your campaign-related activities are done in the Campaigns window.

➤ To work with the Campaigns window

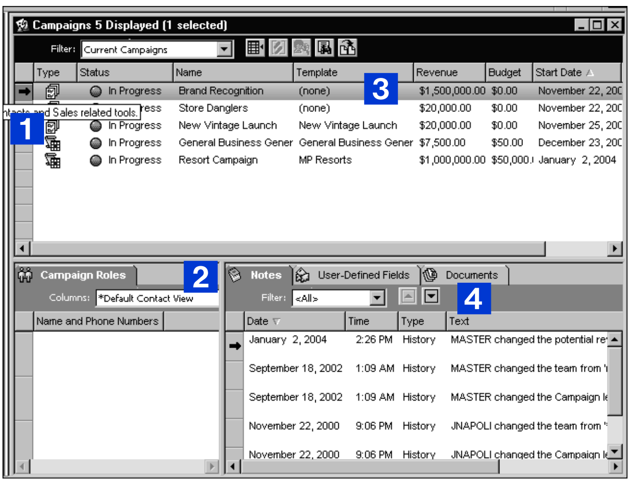
1 Use the **icons** in the Type column to quickly distinguish Automated campaigns from Traditional campaigns.

2 The **tabbed following windows** show additional information for the selected entry. Note that the Campaign Roles following window applies to only Traditional campaigns.

3 Double-click on a **campaign** to open it.

4 Use the **view filter** to display the different types of notes that are added to record campaign activity. For more information on the various types of notes, see the online help.

5 If you are running Maximizer on a SQL database, you manage discounts, coupons, and preferred pricings in the **Discount Library** (File > Libraries > Discount Library).



Organize Your Marketing Efforts

A Traditional campaign template defines a strategy for a marketing team; an Automated campaign template defines a series of automated actions.

Complex marketing campaigns require a well-planned strategy. When you launch a new product or promote your website, for example, you need a coherent plan and you need to coordinate the members of your marketing team towards a common goal. Traditional campaigns help you and your team manage your marketing campaigns.

Using Traditional campaigns, you can do the following:

- Create Traditional campaign templates—detailed plans that identify the factors that influence a marketing campaign and the activities you must perform to complete a campaign.
- Apply these campaign templates to one or more marketing campaigns.
- Effectively schedule and coordinate the marketing process among all members of your marketing team.
- Ensure that all the right people in your organization have up-to-date information about the status of your campaigns.
- Analyze the effectiveness of your campaign templates and create new ones for new campaigns.

The Campaigns window also allows you to record a marketing campaign without a campaign template. Without a campaign template, a campaign simply records the campaign's goal and allows you to assign a marketing team to achieve the goal; no activities or steps are defined to help your team to achieve the goal. You can use this type of campaign for simple marketing campaign objectives.

Design Campaign Templates for Traditional Campaigns

Traditional campaigns allow you to launch structured marketing campaigns in a marketing team environment. A Traditional campaign is created using one of the campaign templates in the Traditional Campaign Template Library. Campaign templates are approaches your organization uses in a marketing campaign.

If you already know how to use strategies and opportunities in Maximizer, you will have no problem learning how to use Traditional campaigns. The process is virtually identical.

Before you learn how to create a campaign template for your company, familiarize yourself with the following terms:

- **Traditional campaign template** - A campaign template is a detailed plan that defines the procedures that contribute to a successful marketing campaign. A Traditional campaign template is composed of steps, which are in turn composed of scheduled activities. For example, you could create a simple campaign template that defines the steps, activities, and roles required to place an ad in a magazine.

- **Steps** - Steps are milestones in the campaign that reflect actions you should take when pursuing a campaign. Each step represents one or more activities. One of the steps for placing an ad in a magazine might be to contact the magazine's advertising department to buy the ad space.
- **Activities** - Activities are actions that form the smallest building block in a campaign. Once a step is started, each activity is turned into a scheduled Hotlist task in Maximizer. An activity in contacting the magazine's advertising department, for example, might be to make the initial phone call to get pricing information.
- **Roles** - Roles are the known influences caused by people that affect the probability of marketing your product or service. For placing an ad, one of the roles would be your contact person at the magazine's advertising department.

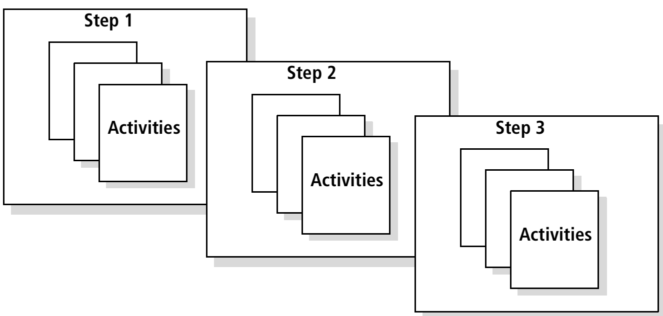
A campaign template must be a detailed plan that defines the procedures that contribute to a successful campaign. Once you create a campaign template in the Traditional Campaign Template Library, you can apply the campaign template's particular marketing plan to any new Traditional campaign you create.

Plan a Traditional Campaign Template on Paper

Before you can enter your organization's marketing strategies as campaign templates, you need to gather information from your marketing people. The best campaign templates combine the knowledge and experience of everyone in your organization; therefore, you should involve as many people in this process as possible. The result will be a pattern of success that you can follow like a road map.

Your first step is to design a general plan—a campaign template—that describes your company's steps, activities, and roles involved in completing the campaign. The most difficult step in creating a new campaign template is in the planning stage. Once you know what the steps, activities, and roles will be, you may then enter the information in the Traditional Campaign Template Library.

A campaign template consists of several steps to achieve the goal.



Each step is composed of activities—individual tasks to be performed by a member of the team.

On paper, try defining the following elements:

- **Campaign template steps**. A step is a high-level action, such as "Demonstrate the product".
- **Activities that compose each step**. An activity is the most basic building block—it is an individual task needed to complete the step, "Call to arrange appointment".
- **Campaign roles**. A role can be any person who influences the progress of a campaign.

When you have finished planning your campaign template on paper, enter your new campaign template in the Traditional Campaign Template Library.

Break Steps into Activities

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a campaign template that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to marketing team members.

Each activity is assigned to a single user or delegated to a team member as a Hotlist task. As the team members mark activities as complete, Maximizer updates the status of the campaign accordingly.

The Traditional Campaign Template Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select them from the list of available activities.

Define the Campaign Roles

The next step in developing your campaign template is to determine the key roles—positions assumed by key people that will directly influence the outcome of a marketing campaign.

When you are defining a Traditional campaign template, you don't necessarily know who will fill these roles for each campaign. If you can define generic roles for your campaign templates—for instance, Printer or Graphic Artist—you can later use people's names for those generic roles for individual campaigns.

Traditional Campaign Template Example

The following is an example of a campaign template for placing an ad in a magazine.

Ad for Magazine

Cost: $17,700.00 Duration: 2.47 week(s)
To create new ad for a trade publication

Steps

Develop new advertising campaign
Cost: $4,500.00 Duration: 1.19 week(s)
Develop new advertising campaign

Follow-up program
Cost: $1,200.00 Duration: 4.00 day(s)
Organize necessary follow-up for marketing program

Activities - Develop new advertising campaign

Identify appropriate advertisers
Identify trade publications and magazines suited for print advertising
Cost: $2,000.00 Effort: 1.14 week(s) Priority:
With: Advertising Agency

Submit ads for the season
Submit completed print ads to all advertisers being used
Cost: $2,000.00 Effort: 5.00 hour(s) Priority:
With: Advertising Agency

Brainstorming
Brainstorming with entire marketing team and agency for new ideas and new offers for the upcoming season
Cost: $500.00 Effort: 3.00 hour(s) Priority:
With: Advertising Agency

Activities - Follow-up program

Telemarketing campaign
Develop a telemarketing campaign for the marketing program
Cost: $200.00 Effort: 2.00 day(s) Priority:

Identify target market
Compile list of geographic territories of high income 30 - 55 yrs & identify retailers in the area
Cost: $1,000.00 Effort: 2.00 day(s) Priority:
With: Advertising Agency

Roles

Advertising Agency

Printer

You can use the above example as a guide in the creation of your campaign template or you can design your own campaign template from scratch.

Create Your Traditional Campaign Template

For additional help in the Traditional Campaign Template Library, press F1.

Once you have your Traditional campaign template planned on paper, entering it into the Campaigns window is easy. The Traditional Campaign Template Library is a tabbed dialog box in which you can create a library of steps, activities, and roles. You then use these elements when you add a Traditional campaign template to the library.

After you have designed a Traditional campaign template, you can then apply it to any new Traditional campaign that you create.

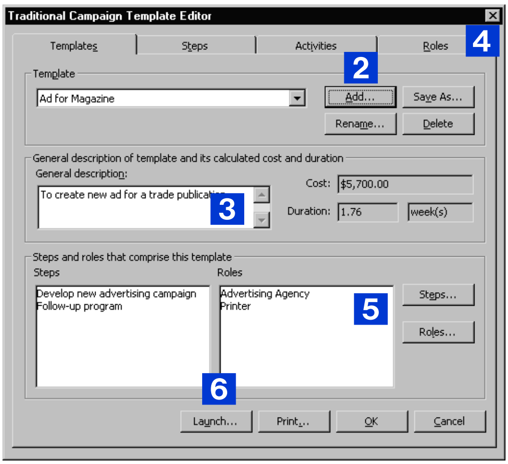
➤ To create a Traditional campaign template

1. Select **File > Libraries > Traditional Campaign Templates**.
2. Click the **Add** button and enter a name for the template.

   Use the other buttons to copy (Save As), rename, or delete campaign templates.
3. Fill in the **general description** for the campaign template.

   The cost and duration are automatically calculated from the cost and effort of the activities.
4. Each tab lets you construct a different template element. Start with the **Roles** tab and finish with the **Steps** tab before you construct your campaign template in the Templates tab.
5. When you're ready to construct your campaign template, click a button (**Steps** or **Roles**) to assign the steps and roles to you new campaign template.
6. Click **Launch to create a Traditional campaign based on this template**.

The Save As button in each tab lets you save the selected campaign template or element under a new name. This can be useful if you want a new campaign template (or template element) but you don't want to create it from scratch.



Create a Traditional Campaign

You can record campaigns without a campaign template, if you wish. Specify "Not using a campaign template" in the campaign's Template tab.

If you have planned and correctly entered your Traditional campaign template, it's easy to implement a Traditional campaign.

➤ To create a Traditional campaign

1. Select **Edit > Add Traditional Campaign** or right-click in the Campaigns window and choose Add Traditional Campaign.

   – or –

   After creating a Traditional campaign template, click the **Launch** button on the Templates tab.

2. Enter the **details for the campaign** working your way through the tabs from left to right.

3. Enter the campaign's **potential revenue**. The budget is automatically calculated from the total cost of the activities (part of steps) in the campaign.

In order for campaigns to be synchronized with MaxExchange, the campaign must belong to a team.

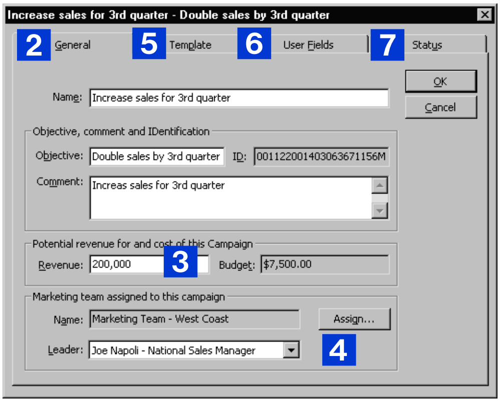
4. Assign the marketing team and leader. You can have different team members for each campaign. This assignment determined where the campaigns are synchronized if you are using MaxExchange.

5. On the **Template** tab, you can choose a pre-defined template, which includes a selection of roles and steps for a campaign.

   After assigning a template, you cannot modify the campaign to have a different template.

6. The **user-defined fields** that you can assign are specific to campaigns.

7. When a campaign is created, the **status** is automatically marked as In Progress. You update this when the status is changed.



The ID number uniquely identifies a campaign. Your system administrator uses Administrator to control whether or not ID numbers are automatically generated.

You can begin working on the new campaign any time you wish— see "Apply and Work the Steps to Complete the Campaign" on page 101.

Assign a Marketing Team to Your Campaign

Use the Assign button on the campaign's General tab to assign a Traditional campaign to any marketing team that has been set up by your system administrator. Teams allow you to delegate individual campaign activities to members of the marketing team. These activities appear in the team member's Hotlist for completion by the scheduled time.

Marketing Team Members

Sales teams are used for opportunities while marketing teams are used for campaigns. Teams are set up in Administrator. For more details, see the Administrator's Guide or Administrator's online Help.

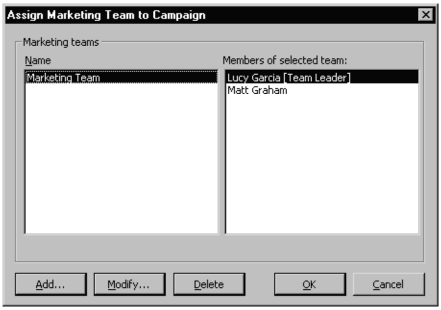
A marketing team is composed of three types of members: a team leader, a team member, and a team member with edit rights.

- **Team Leader** – In a team, one person is designated as a team leader who has the right to make changes to the campaign as well as to the campaign's team.
- **Team Member** – A regular team member does not have the right to change the campaign nor the team. The member's role is to perform the tasks the team leader assigns.
- **Team Member with Edit Rights** – A team leader can grant any member the right to edit the campaign, which essentially gives the same abilities of the team leader. This right must be granted on a per-campaign basis, unless your system administrator specifies otherwise.

If a Traditional campaign doesn't have a marketing team assigned, the user who created the campaign is automatically designated as the leader.

➤ To assign a marketing team to a Traditional campaign

- Click the **Assign** button in the campaign's General tab to view or change a team's membership for the current campaign.



Assign Contacts to Campaign Roles

Before delegating campaign activities to team members and roles, select the Traditional campaign and then assign Contacts to your campaign roles.

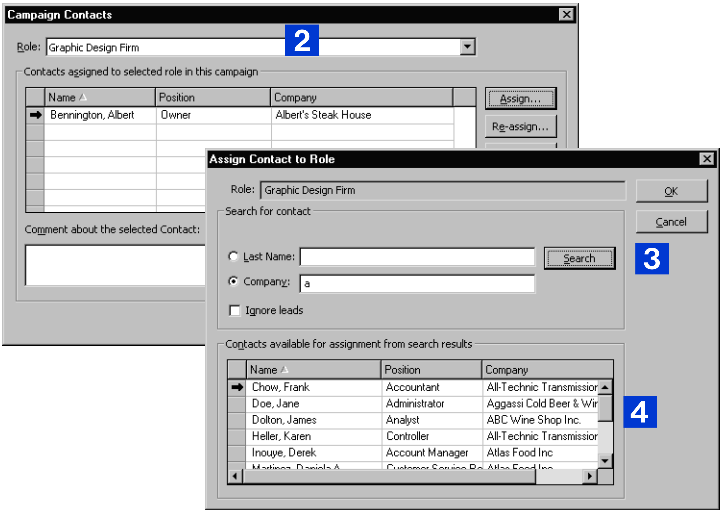
The same role can be shared among all your campaigns, however, when you assign a Contact to a role, it only applies to the selected campaign.

➤ To assign a Contact to a campaign role

Note that roles apply to only Traditional campaigns using a campaign template.

1. Select **View > Review Role**s or click the Review Roles button in the Campaigns window's View bar.
2. Select a **Role** you want to delegate and click the Assign button.
3. Search your Address Book for the desired **Contact**.
4. Select the Contact you are assigning to the role and click **OK**.

5 Click **OK** again when you are finished assigning campaign roles.



Delegate Campaign Activities to Team Members and Roles

If you are working with a marketing team on a Traditional campaign, and you are a team leader or a member with edit rights, you have the ability to delegate the campaign's activities to individual members in the team. You can modify the team's membership or member's rights at any time.

You may have some activities in your campaign that are appropriate for team members with particular skills. The editing of an agreement document, for example, might fall to your writer.

In addition to assigning activities to marketing team members, you also can schedule roles and Contacts for each activity. But first, assign a Contact to each campaign role.

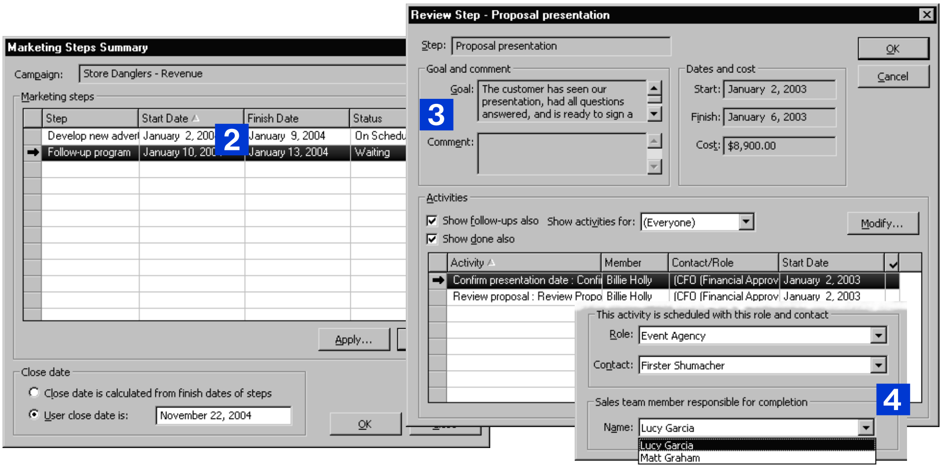
➤ To delegate campaign activities to team members

1 From the View menu, select **Review Steps**.

2 Select a **step** that contains an activity you want to delegate and click **Review**.

3 Double-click the **activity** you want to delegate.

4 Select the **team member** to whom you are delegating the activity and select the role and Contact with which the activity is scheduled.



Apply and Work the Steps to Complete the Campaign

After you have delegated the activities to team members and Contacts, you can begin working through the steps of your campaign and marking each Hotlist task as complete.

? Learn more about working through a campaign's steps by looking up "work the steps in a Traditional campaign" in the online Help.

➤ To apply and review steps

1 Click the **Marketing Steps Summary** button while a Traditional campaign is selected.

– or –

Select **View > Review Steps**.

2 Click the **Apply** button to initiate the step. Activities appear in the Hotlist as soon as the step is applied.

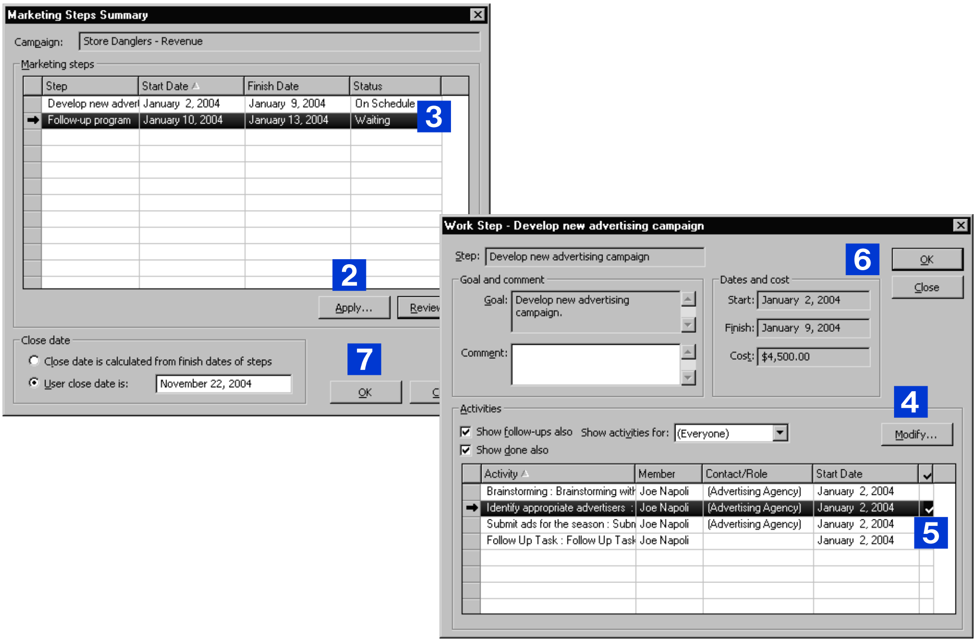
3 After applying a step, double-click the **step** or click the **Work** button (the Work button is not available until you have applied the step).

4 Select an **activity** and click **Modify** to change or delegate an activity.

5 Double-click the **last column** of an activity to mark the activity as complete. You may also mark the task as complete in your Hotlist.

6 Click **OK** to close the Work Step dialog box.

7. Click **OK** again to close the Marketing Steps Summary dialog box.



Pause a Traditional campaign

Sometimes you need to suspend your efforts in a marketing campaign due to changing conditions or other factors. To pause a Traditional campaign, open the campaign and select the Status tab.

➤ To pause a Traditional campaign

1. Open the **Traditional campaign**.
2. Under Current working status, select **Suspended**, enter a reason and comment, and click **OK**. Any Hotlist tasks are archived (not available from the Hotlist) until you reset the campaign to "In Progress".

Market with an Automated Campaign

Use an Automated campaign when you want to have Maximizer automatically send out emails, faxes, or printed documents on a pre-defined schedule. An Automated campaign is very useful if you want to remind customers of a new or upgraded product that you're marketing, encourage a repeat visit to your company's website, or even just to keep in contact with the customer.

You can include merge fields in your outgoing campaign media so all recipients get a message that's customized with their name, company, or any other field in their Address Book entry information. You can even include merge fields in the email subject line.

Automated services are not available for MaxExchange Remotes.

You can "broadcast" an email to any number of Address Book entries to support your marketing campaign. Ask your Internet Service Provider if there is a limit on how many emails that can be sent concurrently. Use the Preferences > Automated Services tab in Administrator to control the cycle time check; these settings can be viewed by users in the same tab.

There are two main types of Automated campaigns:

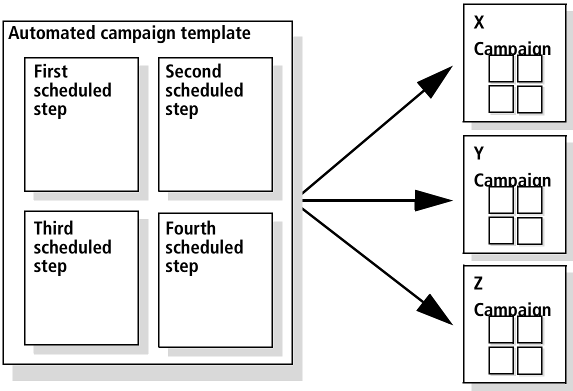
Fixed-Date — These campaigns run for a specified time period. When you apply this type of campaign to a new Address Book entry, all activities of the campaign are applied within the fixed time period. For example, if you launched a campaign comprised of five activities, and the first two activities were completed when a new Address Book entry was added to the campaign, these two activities are applied immediately. The remaining activities are applied as scheduled.

Ongoing — These campaigns repeat indefinitely unless you change the status to suspended. You can add a new Address Book entry at any time during the campaign cycle. When a new Address Book entry is added, the entire campaign is run from start to finish, at the set time intervals. For example, if there was a duration of one week between a set of four emails, each email would be sent one week apart, regardless of when an Address Book entry was added to the campaign.

Creating an Automated campaign requires that you first define a campaign template. The Automated campaign template defines the actions that occur when you implement a campaign; each template contains a series of scheduled activities that must be performed in order to complete the Automated campaign.

When you create a campaign, select which campaign template you want to use, or create an entirely new campaign template with a new set of activities. Think of a campaign as a single implementation of one of your Automated campaign templates. Each time you create an Automated campaign, you are applying an instance of an Automated campaign template. The same Automated campaign

template can be implemented over and over in the form of several campaigns.



Design Automated Campaign Template Activities

? Press F1 for help with any Automated campaign template dialog box.

An Automated campaign template determines the actions that occur during a campaign. The campaign template sets out in precise terms which template(s) to use, and when to send the campaign media (email, fax, or printed document). You can schedule as many activities in a campaign template as you need.

Plan Your Activities

An automated campaign activity is sending an email, a fax, or a printed document. For reference purposes, an email, a fax, or a printed document is also referred to in this document as campaign message.

When adding activities to a campaign template, you'll need to plan some details ahead of time, including the following:

- How many emails, faxes, or printed documents you want to send
- Which file types to use for the campaign activity
- How many days after the campaign is launched that the campaign message is sent

Create an Automated Campaign Template

Once you have a plan worked out, you can start adding activities to your campaign template.

➤ To create a new Automated campaign template

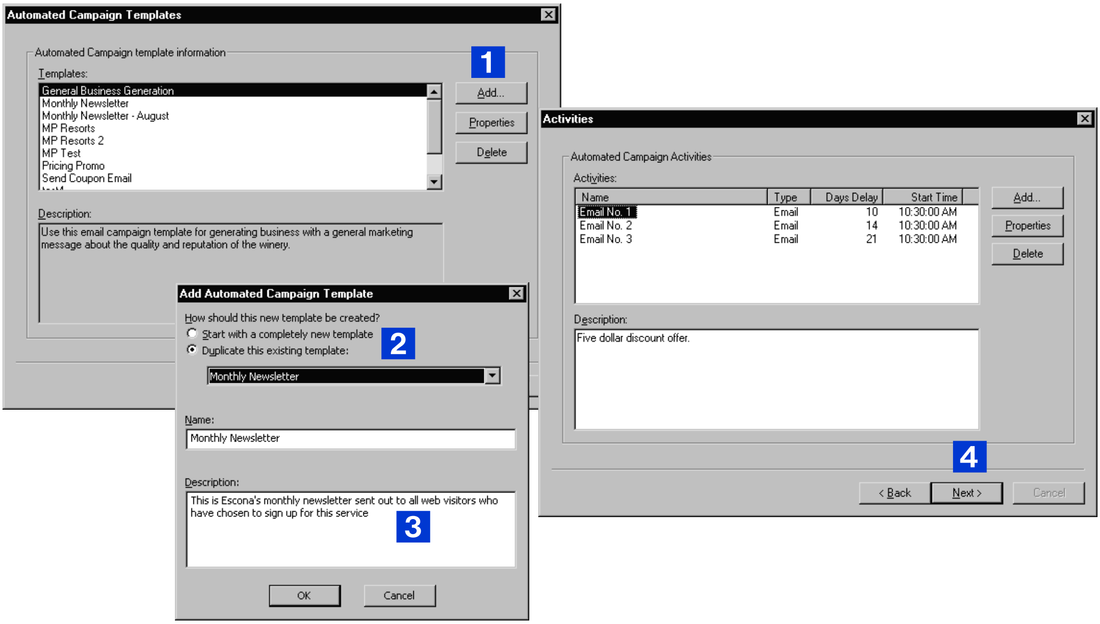
1 Select **File > Libraries > Automated Campaign Templates**. The Automated campaign wizard opens. Click the Add button.

2 Choose whether you are creating an entirely **new campaign** template or one that is based on an **existing campaign template**. If you choose to base the new campaign template on an existing campaign template, Maximizer copies the content of the existing campaign template into your new campaign template.

3 Type a **name and description** for the new campaign template and click **OK**. Click **Next**.

4 In the **Activities** wizard page, use the **Add**, **Properties**, and **Delete** buttons to define the series of activities that comprise this template. See "Define Activities for Your Automated Campaign Template" on page 106 for more information. Click Next.

5 If you want to immediately launch an Automated campaign based on the template you just created, select the **Launch a new campaign based on this template** option. Click **Finish** to save the template.



Define Activities for Your Automated Campaign Template

An activity is an email, a fax, or a printed document that is sent out a certain number of days after an Automated campaign is launched using a campaign template. You can add as many activities as you want.

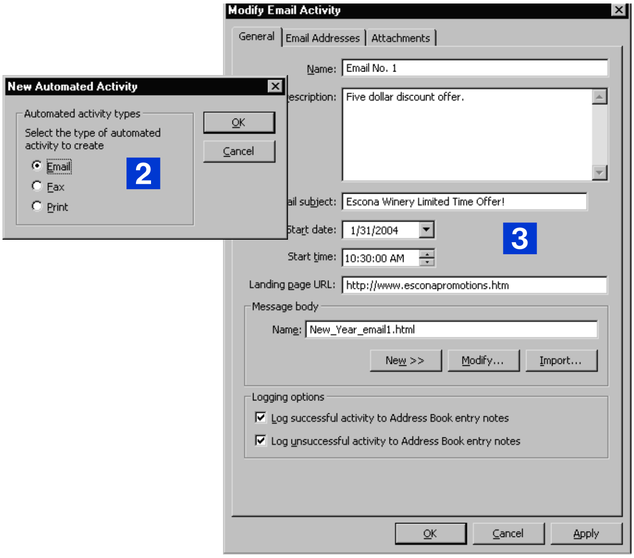
➤ To define automated campaign activities

1. Select **File > Libraries > Automated Campaign Templates**.
2. In the **Activities** wizard page, click the **Add** button. In the "Automated campaign activities" dialog box, select the type of activity—email, fax, or print. To modify an activity, select it and click the **Properties** button.
3. Enter the **details of the campaign activity** in the Add [Email, Fax, or Print] Activity dialog box.
   - Enter the **name** and **description**.
   - For **email activities**, click the ellipsis button to insert a standard merge field into the subject line of the email.
   - Specify the **Delay of days to start activity**, which defines the number of days after the campaign is launched that you wish to send the campaign message (email, fax, or printed document). When reviewing the activity, "delay of days" becomes "start date" and a pop-up calendar becomes available.
   - Specify the **Preferred start time**, which defines the time of day the campaign media should be sent.
   - Specify the **landing page URL**—this applies to email activities only. When you use the Campaign Redirect URL in your email message template, the customer is redirected to this URL (when the customer clicks on the Campaign Redirect URL merge field). The landing page URL can be any URL—for example, this could be your company website. For more information, refer to "Campaign Merge Fields" on page 109.
   - Click the **New** button, then choose whether to create a Maximizer document (.ETF file) or an HTML file (available for only email activities), and enter a name for the message template. Make sure you save your finished template. Alternatively, you can import a supported file type as the message or modify an existing file. The actual message body is saved as part of the activity once you click OK in the General tab of the Activity dialog box.
   - For fax and print campaigns, select a **printer**. The list includes all printers and fax applications installed on the Maximizer Automated Services computer (Maximizer server)

that have been initialized for the fax/print service through Administrator.

- Choose your **logging options**. A note is created for the Address Book entries involved in the campaign if the campaign activity is successful or if the activity fails.

If you are creating an email activity, continue with the following steps. For fax and print activities, click **OK** to save the activity.



Recipients will see the name and email address that you enter here so it should be recognizable by the recipients. For example, the name could be your company name, as in Maximizer Software, and the address could be something like promos@maximizer.com.

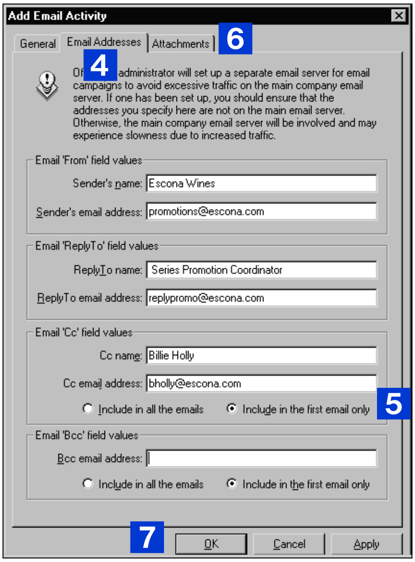
4 Select the **Email Addresses** tab at the top of the Add Automated Campaign Activity dialog box. Specify a sender name and address.

Specify a “reply to” name and address. Replies to the email activity are sent to this address. If you are targeting a large audience, it may be useful to set up an email address specifically for replies.

If you wish, use the "Cc:" and "Bcc:" fields to define a "carbon copy" or "blind carbon copy" recipient. This can be useful if you want to send a copy of an email to yourself or to another person in your company, as well as to the targeted recipients.

5 Use the **Include in all the emails** or **Include in the first email only** options to ensure the Automated campaign is working by sending someone, such as yourself, a copy of the email for this campaign activity. The cc and bcc recipients can receive an email

for each Address Book entry (first option) or just the first Address Book entry in a batch (second option).



Your system administrator controls how many automated activities can be sent at one time by grouping them into batches (e.g., 100 emails) and setting a minimum cycle time between batches (in minutes, hours, days, weeks, or months). This reduces the load on your email server, printer, or fax by spacing out a large quantities of activities.

6 Select the **Attachments** tab and click the **Add** button to add any attachments.

7 Click **OK** to finish creating the activity.

Address Book entry recipients are selected when you actually launch the Automated campaign.

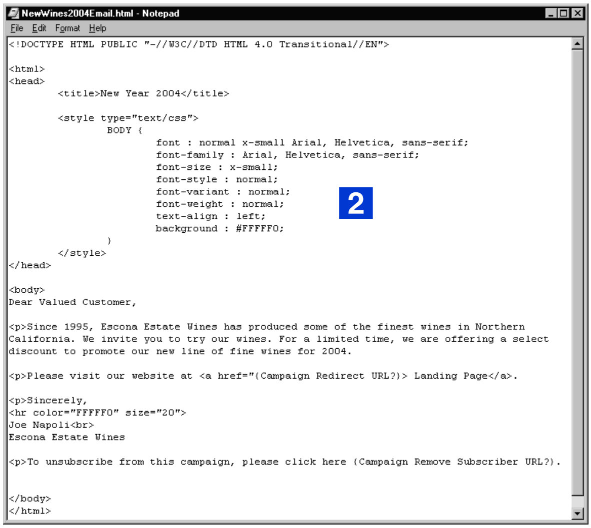
Create Message Templates for Automated Campaigns

The principal action of an Automated campaign is to send a message to one or more recipients via email, fax, or printed document. These messages are based on templates you create using the Automated Campaign Template Library. Templates can be done using the Maximizer Word Processor (text files) or through any HTML editor (HTML files).

When you construct an Automated campaign template, you choose a message template to use for each email. Email templates can contain merge fields that are replaced with the recipients' information when the email is sent. For example, your template's salutation might be "Dear {Mr/Ms?} {Last Name?}" or "Dear {First Name?}". These merge fields are replaced with a Contact's name, as in "Dear Ms. Kaworski".

➤ To create email message templates

1. Open your **HTML editor**.
2. Edit or write your **email template's content**, inserting merge fields where appropriate.




```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">

<html>
<head>
        <title>New Year 2004</title>

        <style type="text/css">
                BODY {
                        font : normal x-small Arial, Helvetica, sans-serif;
                        font-family : Arial, Helvetica, sans-serif;
                        font-size : x-small;
                        font-style : normal;
                        font-variant : normal;
                        font-weight : normal;
                        text-align : left;
                        background : #FFFFF0;
                }
        </style>
</head>

<body>
Dear Valued Customer,

<p>Since 1995, Escona Estate Wines has produced some of the finest wines in Northern
California. We invite you to try our wines. For a limited time, we are offering a select
discount to promote our new line of fine wines for 2004.

<p>Please visit our website at <a href="{Campaign Redirect URL?}> Landing Page</a>.

<p>Sincerely,
<hr color="FFFFF0" size="20">
Joe Napoli<br>
Escona Estate Wines

<p>To unsubscribe from this campaign, please click here {Campaign Remove Subscriber URL?}.


</body>
</html>
```

In the above example, an email will be sent to notify the recipients of a product discount. The message template uses two of the available merge fields for automated campaigns—the Campaign Redirect URL and the Campaign Remove Subscriber URL. For more information on campaign merge fields, refer to "Campaign Merge Fields" on page 109. You may want to write several message templates for different types of campaigns, such as a thank you email, a reminder to visit your online catalog, or a newsletter. First browse through the existing Maximizer templates to see what you can use.

Maximizer is capable of sending text and HTML emails, in addition to the regular email template file (.ETF) format created by the Maximizer Word Processor. Use an editor of your choice to create your HTML or text files.

The easiest way to use merge fields in HTML is to create an email template using the Maximizer Word Processor, inserting the desired merge fields, and then copying the template (with the merge field syntax included) into the HTML file. You can choose the HTML file when you are setting up your activity.

Campaign Merge Fields

There are merge fields available in the Maximizer Word Processor that are specific to automated campaigns. These merge fields can be

Although some of these merge fields can be used in .ETF and .TXT files, these are best suited for HTML.

For more information on the dialog boxes where the campaign tracking statistics appear, press F1 to see the context sensitive help.

The Campaign Remove Subscriber URL merge field is available for SQL versions of Maximizer only; not available for Pervasive.

extremely useful for tracking customer information regarding resulting visits to your website and opened campaign emails.

- **Campaign Opened Email Tracking URL** – used to track the number of customers that have opened an automated campaign email. This can be used with only HTML message templates. When a customer opens a campaign email, the "opened count" is updated in the Review Automated Campaign dialog box and in the Automated Campaigns following window (Edit > Open Automated Activities List).
- **Campaign Redirect URL** – used to track how many customers hit your website as a result of an automated campaign email. The redirect URL calls an ASP page, which is installed and configured at the time of installing Maximizer. If necessary, the redirect script location can be modified in the Automated Services preferences tab in Administrator. When a customer clicks on this URL, the website hit is updated in the Review Automated Campaign dialog box and in the Automated Campaigns following window (Edit > Open Automated Activities List).
- **Campaign Remove Subscriber URL** – used to unsubscribe customers from an automated email campaign. When a customer clicks on this URL, the Do Not Solicit By field is updated for the entry (Basic Information tab)—the customer's entry is marked to not be solicited by email.
- **Service Computer Name** - used to identify the automated services computer (Maximizer server) from which the automated email was sent. Typically, you could use this internally through a hidden tag in your HTML. This field would be useful when you have more than one automated services computer running campaigns.

Following is an example of what your HTML syntax would look like if you use all four merge fields in the body of your email message.

```
<HTML>
<body>
 <img src="{Campaign Opened Email Tracking URL?}">
<br>
Please click on link:
<br>
 <a href="{Campaign Redirect URL?}">Landing Page</a>
 <br>
 Please click here to remove yourself from any campaign
 <a href="{Campaign Remove Subscriber URL?}">Unsubscribe
from campaign</a>
 <br>
```

```
 You are receiving email from this Service Computer,
{Service Computer Name?}.
</body>
</HTML>
```

Launch an Automated Campaign

An Automated campaign is essentially an implementation of one of your Automated campaign templates. You can launch as many campaigns as you like using the same campaign template and manage them in the Campaigns window as you would for a Traditional campaign.

An Automated campaign is always associated with one or more Address Book entries—the Address Book entries are the recipients of the messages sent in the campaign. Before you attempt to launch an Automated campaign, you must select the Address Book entry recipients.

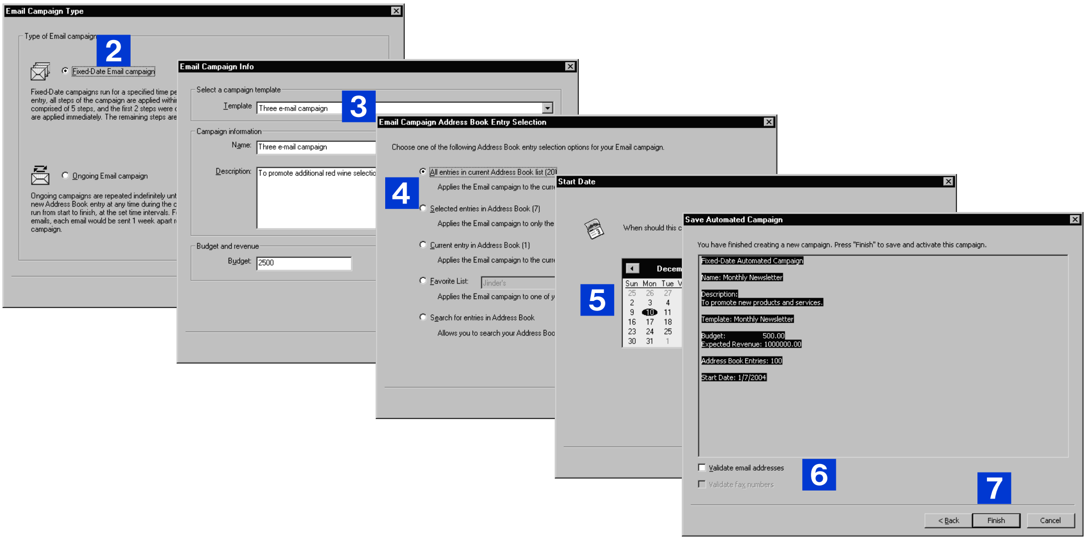
➤ To launch an Automated campaign

1. Choose **Edit > Add Automated Campaign**.

   – or –

   Right-click in the Campaigns window and select **Add Automated Campaign**.
2. Choose the type of campaign you want to create—**Fixed-Date** or **Ongoing**.
3. Choose the **template** on which this campaign is based. Also, enter the budget and expected revenue.
4. Choose the Address Book entry **campaign recipients**. The favorite list option is effective for a large number of subscribers.
5. Select the **date** to begin the campaign.
6. Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol or choose **Validate fax numbers** to be notified of invalid fax numbers.

7 Click **Finish** to save and launch the campaign.



Check an Automated Campaign's Status

After launching your new Automated campaign, it now appears in the Campaigns window. If you don't see it, select All Campaigns or Automated Campaigns from the View filter. Ongoing Automated campaigns display different icons in the Type column than Fixed-Date Automated campaigns. Likewise, Automated campaigns are distinguished from Traditional campaigns.

To find out how many emails are successfully delivered in a campaign, select the campaign's Template tab and click the Review button to view each activity's status, start date, the number of emails that were successfully sent to the subscribers, the number that failed, and the total number sent. For example, emails "fail" when the email address is blank, the @ symbol is missing, or there are other delivery difficulties beyond Maximizer's control. Additionally, a note is added to the campaign and each subscribed Address Book entry to record the number of sent and failed emails. You can also track the number of opened emails and visits to your website resulting from the campaign if you use the associated campaign-specific merge fields. For more information on these merge fields, see "Campaign Merge Fields" on page 109.

Manage Automated Campaigns

Now that you have created Automated campaigns, you need to manage their progress. Although an Automated campaign will continue without further intervention, sometimes daily events require you to suspend a campaign, view a campaign's Address Book entries, or remove Address Book entries from a campaign.

View a Campaign's Address Book Entry List

Each Automated campaign in your Campaigns window targets one or more Address Book entries. You can quickly retrieve a list of the campaign's Address Book entries and display it in the Address Book window.

➤ To retrieve a campaign's list of Address Book entries

- In the Campaigns window, right-click on the Automated campaign and select **Retrieve Address Book Entries** from the right-click menu. The current list in the Address Book window is replaced with a list of the campaign's Address Book entries. If you wish to print this list, you can then print a Column Report. You can also retrieve the Address Book entries for which the campaign was not successful by right-clicking and choosing **Retrieve Unsuccessful Address Book Entries**. This information is also available in the Automated Campaigns following window.

Remove Address Book Entries

ⓘ You can flag Address Book entries to not be included in specific types of campaign activities by using the "Do not solicit by" field on the Basic Information tab.

Occasionally, you may need to remove entries from an Automated campaign. For example, certain recipients may ask to be removed from a mailing list or you may want to modify the list for other reasons.

You can remove any number of entries from an Automated campaign. Simply use the Subscribers tab of the respective campaign.

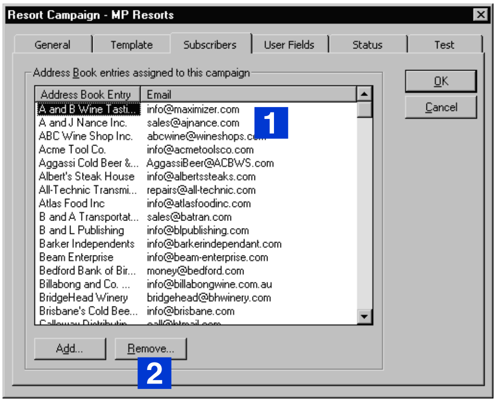
➤ To remove an entry from a campaign

1. Select the **Address Book entry** you would like to remove from the campaign in the Address Book window.
2. Open the **Automated Campaigns** following window.
3. Right-click and choose **Unsubscribe from Selected Campaign**.

➤ To remove several entries from a campaign

You can test the campaign using the Test tab. When you run a test, all the activities in the campaign are sent to the "test list" at once.

1. Select the **entries** you'd like removed from the campaign in the **Subscribers** tab of the campaign.
2. Click the **Remove** button. The entry is no longer subscribed to the campaign.



➤ To add an Address Book entry to a campaign

- Click the **Add** button in the **Subscribers** tab. Address Book entries that are added after a campaign is launched are handled differently depending on whether you launched a Fixed-Date or Ongoing Automated campaign. See "Market with an Automated Campaign" on page 103 to learn at what point in the Automated campaign the new entries will be added.

Suspend, Resume, View, and Retry an Automated Campaign or Activity

Sometimes you need to suspend your efforts in a marketing campaign due to changing conditions or other factors. To pause an Automated campaign, open the campaign and select the Status tab.

➤ To suspend and resume an Automated Campaign

1. Open the **Automated campaign**.
2. Select the Status tab. Under the Current working status, select **Suspended** and click OK. You can resume this campaign any time by changing the status to **In Progress**.

➤ To suspend and resume an automated activity

1. Open the **Automated campaign**.
2. Select the **Template** tab and click the **Review** button.
3. Select the **activity** you want to suspend and click the **Suspend** button. Click the **Resume** button if you'd like to begin the activity again.

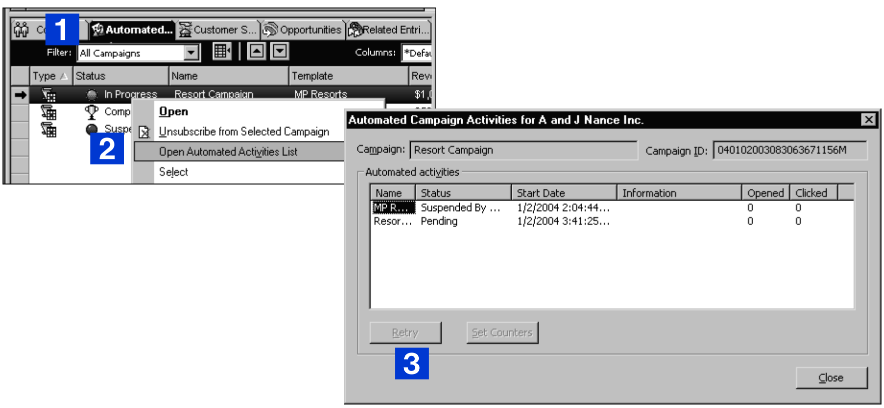
View and Retry Automated Campaign Activities

You can review the status of Automated campaign activities for each subscriber and retry activities that have failed.

➤ To review Automated campaign activities for each subscriber of a campaign

1. While the Address Book entry you are viewing activities for is active in the Address Book window, open the **Automated Campaigns** following window.
2. Select a **campaign**, right-click, and choose **Open Automated Activities List**.
3. If a campaign activity has failed, you can try to perform the activity again by selecting the activity and clicking the **Retry** button.
4. To reset the counters for print and fax campaign activities, click the **Set Counters** button. These counters are set up through merge fields available for email campaigns. See "Campaign Merge Fields" on page 109 for more information.

The Set Counters button is available for only print and fax campaign activities. Email activities cannot be reset as the count is updated dynamically.



Encourage Return Visits to Your Online Store

An offer of a special discounted price is an excellent way to draw new customers to your online catalog or encourage a customer to make another purchase. If you are running Maximizer on a SQL database (CRM and eCRM Suites for SQL), i.e., if you are using eStore Manager, you can use the Discount Manager to set up three types of reduced pricings: discounts, coupons, and preferred pricings.

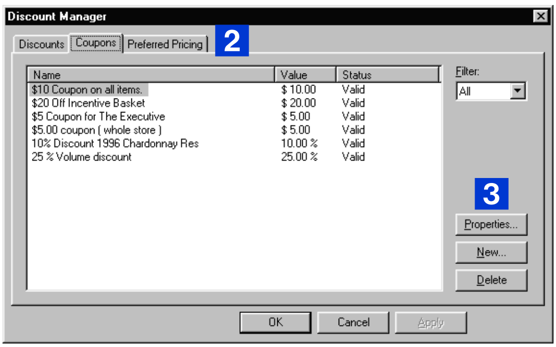
The Discount Manager manages a variety of pricing discounts for your online catalog items. By setting up specific promotions, you can offer a global discount to all customers using a discount, or offer a special price to specific individuals or companies using coupons and preferred pricings.

Coupons and preferred pricings must be associated with one or more Individuals or Contacts. Discounts apply to all customers.

➤ To access the Discount Manager

1. Select **File > Libraries > Discount Library**.
2. Select the related tab to manage **discounts**, **coupons**, or **preferred pricings**.
3. On each of the tabs, you can set up new discount items by clicking the **New** button, or modify the properties of a discount item by clicking the **Properties** button.

? See the F1 help in the Discount Manager for more information on each tab.



For each promotion you set up, you can choose to which catalog item it applies and specify a date range for when the promotion is valid.

Offer a Discount, Coupon, or Preferred Pricing to Customers

Discounts offer to all catalog visitors within a certain date range a special price on one or more items in your catalog. When a visitor orders an item with a discount, the amount of the discount is automatically deducted from the item’s price.

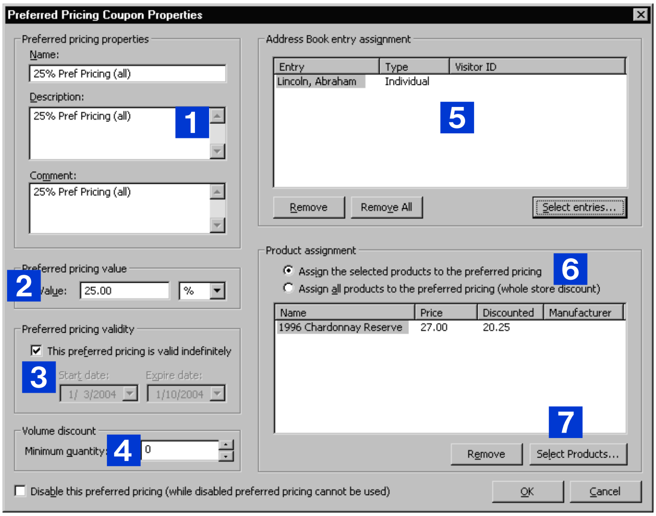
Coupons are the ecommerce equivalent of paper coupons you might give to a cashier in a store. Unlike paper coupons, shoppers do not have to carry the coupons in order to use them; the appropriate coupons will be presented to the shoppers at the time they check out. Coupons are assigned to specific Individuals or Contacts for products or services purchased through your online store. Coupons can be used only once.

Preferred pricing is very similar to offering a coupon—it provides a special price on one or more catalog items. Preferred pricings are intended to be used by your marketing group to encourage a prospect to visit your online store. You can send an email to a selection of Individuals or Contacts informing them they qualify for a special discount, if they purchase an item within a certain date range, and assign the preferred pricing to the same Individuals or Contacts in the Preferred Pricing dialog box. While a coupon can be used only once, a preferred pricing will be applied until the expiry date.

➤ To set up a discount, coupon, or preferred pricing

1. Enter the **discount**, **coupon**, or **preferred item** properties describing the purpose of the offer.
2. Set the **offer value**—this can be specified as a percentage or a cash value. If you specify a monetary value, the value is in the same currency as your catalog. For example, if you specify 5.00 and select “$” from the drop-down list, and your catalog is in UK pounds, the value of the discount is £5.00.
3. If you select the **indefinite validity** checkbox, the offer won’t expire until you delete it. Otherwise, specify a date range.
4. Set the number of ordered items (in your eStore catalog) required to make this offer valid.
5. Specify the **Address Book entries** to which the offer applies. The entry must be an Individual or Contact—the Discount Manager automatically applies the discount to only these types of entries. For coupons and preferred pricing, you can choose to apply the discount item to a specific entry or all entries. Discounts apply to all entries in your Address Book.
6. You can choose to include the offer for **specific products** or for **all items** in your catalog.

7 If you choose to make the offer apply to only certain products, click the **Select Products** button to select the items from your online catalog.



Print the "Hard Copy"

There are a few different ways to print information from the Reports menu in the Campaigns window. Column reports are a fast way to print information as it appears in your current list, while a Detailed report lets you print more detailed information. The Note report can print your campaign notes.

If you need to print more complex reports on your campaign information, use the report options in Reporter or Maximizer. The Crystal Reports menu allows you to use the Crystal Embedded Report Designer for Maximizer to create your own Crystal reports.

Column Report

The Column report is a standard report that lets you print the information in the selected window. Because the Column report prints the information in the same format that appears in your column setup, you know exactly what information is going to be printed. The Campaigns window allows you to change your column setup, so you can display and print as much or as little information as you need.

Detailed Report

The Detailed report allows you to print more information than the column report. When you print a Detailed report from the Campaigns window, you can choose to print: activities, roles, steps, user-defined fields, document summary, and notes.

Note Report

A Note report prints the notes for the campaigns window. You can choose to print the notes for all entries or just the selected entry.

Following are the note types created related to campaigns:

- **Email** – created each time an email is sent as part of an Email campaign.
- **History** – created when campaigns are added or changed.
- **Manual** – added manually to the Notes window.
- **Other** – third-party or custom notes created by your system administrator.
- **Tasks** – created when a Traditional campaign activity is scheduled or completed, or when a follow-up task is scheduled.
- **Mail-outs** – created each time a fax is sent out or a print job occurs for an automated campaign activity.

CHAPTER 7

Providing Customer Service

Providing the Key for Success with Customer Service

In this chapter...

Provide Customer Service

The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

The Customer Service window is list-based like the other Maximizer windows. For quick access to frequently-used options in the Customer Service window, use the View bar buttons. For example, to quickly escalate a case, click the Escalate Case button.

Select View > Column Setup to change the displayed columns.

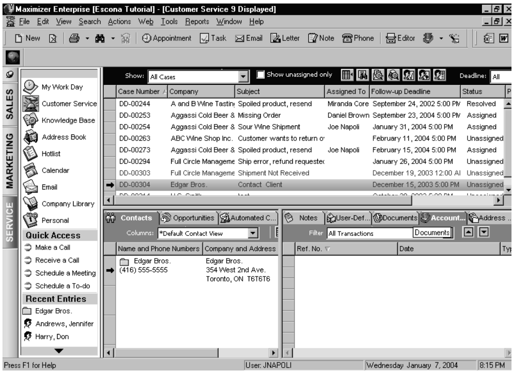
The Customer Service following window displays the customer service cases associated with the selected Address Book entry. You can add and modify cases for the selected entry only.

See "Email Customers Regarding Case Status" on page 131 and "Email Users Regarding Case Status" on page 132 for more information about email templates used for notification of customers and users.

When a case is created, assigned, escalated, or resolved, a generic email can be sent to the customer and any users notifying them of the case situation. Maximizer automatically inserts the basic case details in the email so you don't have to write the email with case details each time. Case email notification allows you to effectively manage your customer service business processes.

When working with the Customer Service window, keep the following points in mind:

- Cases are **displayed in red** when they are older than the follow-up deadline specified for the case.
- You can use the **view filter** to show cases assigned to you or show other queues.
- Use the **toolbar** buttons to resolve, assign, and escalate cases.
- View cases according to deadline using the **Deadline filter**.



Add Cases

For assistance with entering a case, press F1 for detailed information on each field in the Case dialog box.

➤ To add a customer service case

1. A customer service issue is always associated with a customer, so select the respective **Company**, **Individual**, or **Contact** and drag it to the **Customer Service** icon. You can also right-click in the **Customer Service** window and choose **Add Customer Service Case**.
2. Enter the case **description**. Select the mandatory product line or service area to which the case pertains. Case products and categories are defined in Administrator's File > Preferences > Customer Service tab.
3. Specify a **date and time to follow-up** on this case with the Address Book entry. A Hotlist task, based on the follow-up deadline, is automatically created for the assigned user when a case is created. The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete.
4. Fill in the remaining **case details**. Maximizer will prompt you if you are missing mandatory information.

   When assigning the Company or Individual Contact name, you can add a new Contact to the associated entry by clicking the ellipsis button, and then clicking the Add button.

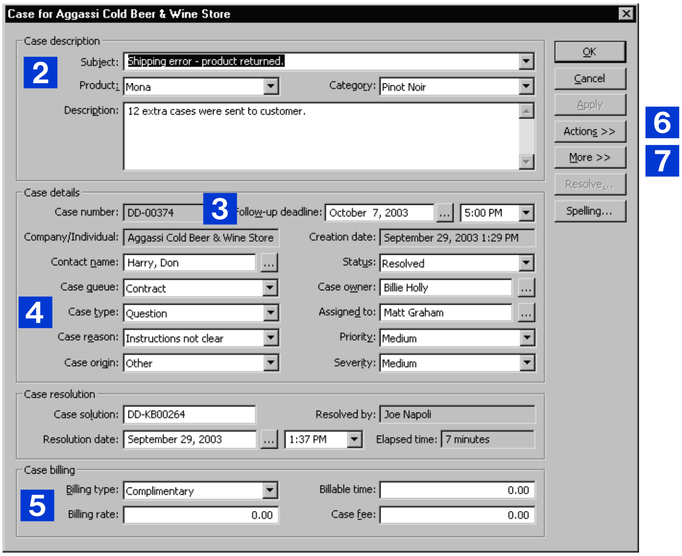
   The case owner is the person who is ultimately responsible for the closure of the case.

   Once the case has been resolved, the related information will appear in the case resolution section of the dialog box. The associated knowledge base article number is automatically entered as the case solution when the case is resolved, however, you can enter a value if you choose not to create an article.

Many case values, such as Case Origin, are defined in Administrator preferences on the Customer Service tab.

5. Select the case **billing type** and enter a **billable time** (in hours) and billing rate if applicable. The case fee is calculated automatically based on the billing time and rate.
6. Perform common actions related to the case or Address Book entry by clicking the **Actions >>** button.

7 Click the **More >>** button to assign Address Book user-defined fields that pertain to customer service. See the online help for more information on customer service user-defined fields.



To learn about assigning cases to users, see "Assign and Escalate Cases" on page 126.

➤ To use a customer service case default entry

- If you frequently assign or enter the same case values, and want to save time by having those values pre-entered each time you insert a case, select **Edit > Default Entry** to specify those case values. Some fields, such as the follow-up deadline and the elapsed time, are grayed out because they cannot be predetermined. The case number and associated Company/ Individual are automatically assigned when the case is created.

➤ To print a case report

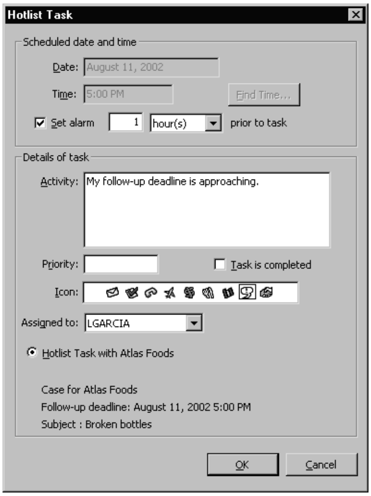
- Create a list of entries you want to print; do not select any entries if you would like all entries. Right-click in the Customer Service window and select **Print > Column Report** or **Detailed Report**. You also can report on overdue, unassigned, and workload cases according to the queue, product, and/or customer service representative. See "Set Your Maximizer Preferences" on page 188 to learn more about printing Maximizer reports.

Case Hotlist Tasks

Case tasks are created regardless of Hotlist access rights.

A Hotlist task is automatically created when a user and follow-up deadline are assigned to a case. When a case is assigned or escalated, a Hotlist task is created for the user to which the case has been assigned or escalated. The original user's task remains. If a case is assigned or escalated to yet another user, a task is created for that newly-assigned user and so on for each assigned user. When a case is resolved, the original task is automatically marked as complete.

The task date and time correspond with the case follow-up deadline and the assigned user, the associated Address Book entry, and the case subject are included as the task details.



Assign User-Defined Fields to Cases

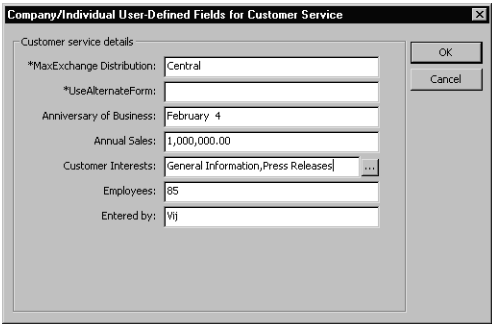
Up to 10 Address Book entry user-defined fields can be flagged in Administrator's File > Preferences > Customer Service tab as pertaining to customer service so they can be quickly assigned while a case is open.

User-defined fields that pertain to customer service are applicable to all cases associated with an Address Book entry while customer service user-defined fields are applicable to specific cases. Values of customer service user-defined fields can be unique to each case.

User-defined fields that pertain to customer service also can be assigned using the Address Book entry's User-Defined Fields tab. They are not visible in the Customer Service User-Defined Fields window.

➤ To assign Address Book user-defined fields to a case

- Click the **More >>** button and select the **Company/Individual (or Contact) Customer Service Information** option to assign user-defined fields that pertain to customer service.



Assign and Escalate Cases


Resolve, Assign, and Escalate buttons

Cases should be assigned to the customer service team member who is best able to handle the type of issue. A customer service team member is categorized in Administrator as a customer service representative or a customer service manager, though a manager can serve both roles. Cases are "assigned" to representatives and "escalated" to managers when representatives are unable to resolve a case.

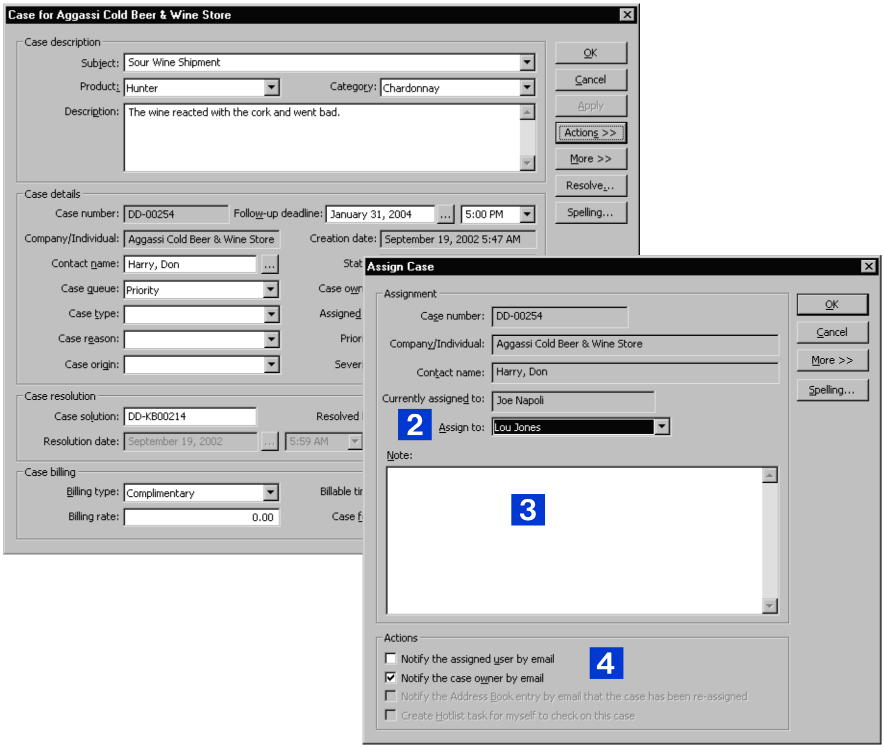
➤ To assign and escalate a case

1. In the Case dialog box, click the **Actions >>** button and choose **Assign Case**.

   – or –

   Click the **Assign Case** button in the view bar.
2. In the Assign Case dialog box, select a **user** from the Assign to list. To be listed in this dialog box, and to access the Customer Service window, users must be given sufficient rights using the Customer Service Manager or Customer Service Representative option in Administrator's File > Users > [user ID] > Security tab.
3. Enter a **note** about the case assignment if necessary.
4. Select the corresponding option to notify the assigned user and/or case owner.

5 Click **OK** to close the Assign Case dialog box. Click **OK** again to close the case.



Cases can be assigned and escalated as often as required.

When a case is assigned or escalated, you can type a message to record why the case was assigned or escalated. This message is then included in the logged note.

You can email the user who is now responsible for the case when you assign or escalate a case. The email is system-generated and cannot be edited in Maximizer or Administrator. See “Email Users Regarding Case Status” on page 132 to see what information the email contains.

The customer also can be notified by email when a case is assigned or escalated so the customer always knows who is handling the case although the owner of the case is the person who is ultimately responsible for the closure of a case. If a Contact is associated with the case, the email is sent to the Contact. Otherwise, the email is sent to the Company/Individual. See “Email Customers Regarding Case Status” on page 131 to create and assign customer notification email templates.

Resolve Cases

Resolve, Assign, and Escalate buttons

When you have solved a customer's issue, you "resolve" the case in the Customer Service window. Document the details of how the case was resolved, add a new solution (if any) to the knowledge base, and notify the customer and user to whom the case is assigned. You can perform these tasks right in the Resolve Case dialog box.

1. In the Case dialog box, click the **Actions >>** button and choose **Resolve Case**.

   – or –

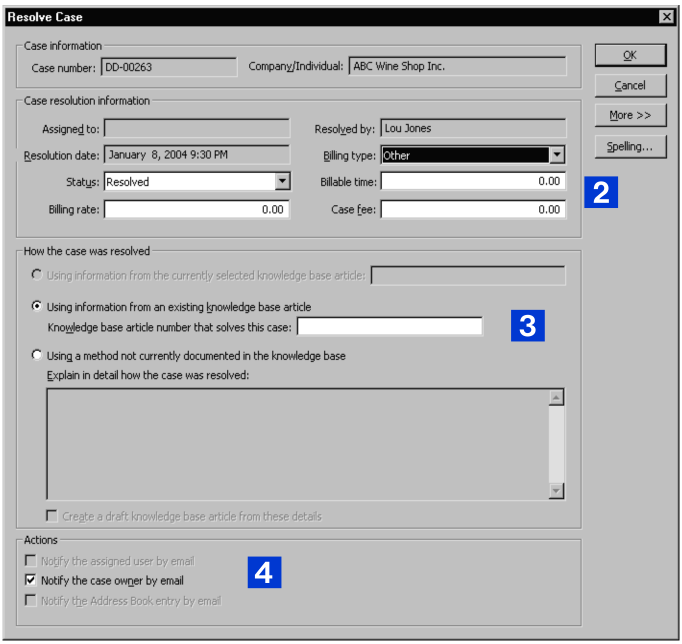
   Click the **Resolve** button in view bar.

2. In the Resolve Case dialog box, select the **billing type**, **billable time**, **billing rate**, and enter a **case fee**, if appropriate.

3. In the **How the case was resolved** group box, select the appropriate option.

4. Select the corresponding option in the **Actions** section to notify the case owner.

5. Click **OK** to close the Resolve Case dialog box. Click OK again to close the case.



There are three ways to specify how a case was resolved:

- Using information from the **currently selected knowledge base article**

  Select this option if the currently selected knowledge base article resolved, or assisted in resolving, the case. The knowledge base article number is automatically inserted.

  If the status is set to Abandoned, this option is unavailable.

- Using information from an **existing knowledge base article**

  Select this option if an existing knowledge base article resolved the case. Enter the knowledge base article number.

- Using a **method not currently documented in the knowledge base**

  Select this option if the case was resolved without the assistance of an existing knowledge base article. Type a concise, detailed explanation of how the case was resolved. Select the “Create a draft knowledge base article from these details” checkbox if you want the explanation to be stored as a draft knowledge base article.

  If the status is set to Abandoned, this option is unavailable.

See “Record Case Solutions in a Knowledge Base” on page 133 to learn more about knowledge base articles.

You can email the user who is now responsible for the case when you resolve a case. See “Email Users Regarding Case Status” on page 132 to see what information the email contains.

Monitor Cases

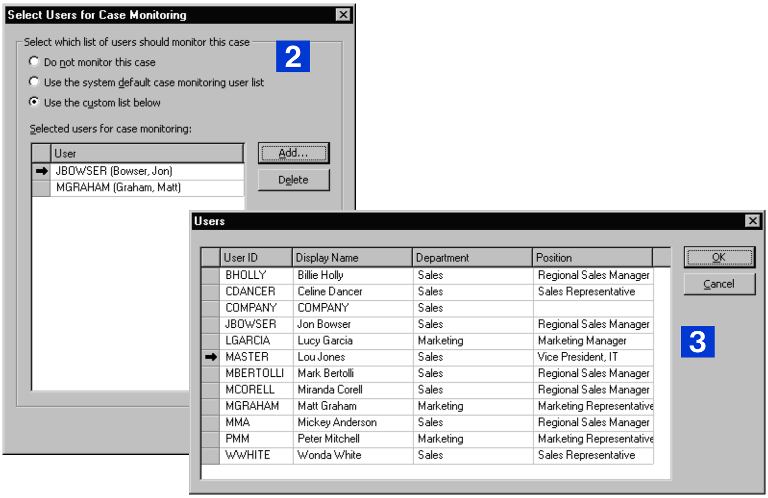
? Case monitors also receive an email each time a case note is inserted or modified.

When a case is created, assigned, escalated, resolved, or deleted, an email can be automatically sent to one or more users notifying them of the creation or change. These users might not be familiar with the case and might not even have access to the Customer Service window—any user in the Address Book can be a case “monitor”.

A default list of monitors is set up in Administrator (File > Preferences > Customer Service tab) and automatically applies to *all* created and modified cases in the Address Book—users do not need to assign monitors on a per-case basis. However, if desired, and on a per-case basis, users can assign other monitors or disable case monitoring.

➤ To select a user for case monitoring

1. Select a case, right-click and choose **Case Monitoring**.
2. Choose one of the **case monitoring options**.
3. If you select to use a custom list for case monitoring, select the **case monitors** from the Users list.



> ⓘ Depending on the volume of cases your organization generates, monitors could potentially receive hundreds of emails per week. Keep this in mind when allocating case monitors.

Whether or not the “Notify the assigned user by email” option is checked in the Assign, Escalate, or Resolve dialog box, an email is sent to the default case monitors. These users also receive an email each time a case note is inserted or modified.

The email is system-generated and cannot be edited in Maximizer or Administrator. The email content sent to users is the same as the email content sent to case monitors. See “Email Users Regarding Case Status” on page 132 to view the email content.

Following are the case monitoring choices available to each user for each case:

- **Do not monitor this case** – Removes users from the list so no user receives an email regarding this case.
- **Use the system default case monitoring user list** – Displays the users specified in the system default case monitoring list. This list is created and edited using the Users button in Administrator’s File > Preferences > Customer Service tab.
- **Use the custom list below** – Displays the users specified in the default case monitoring list and allows you to modify the user selection.

All users with case modification rights can add or remove monitors; case monitoring access rights are not separate from general case

rights. If a particular user should not be modifying case monitors, all case modification rights can be removed in Administrator.

Email Customers Regarding Case Status

Maximizer can automatically email customers when their customer service cases are created, assigned, escalated, or resolved. To set up customer service case email notification, you must create the email templates and assign each template to an action (Case Creation, Case Assignment, Case Escalation, and Case Resolution). Merge fields in the email template customize the emails.

When writing the email templates, remember that each template will apply to all customer service cases for case creation, assignment, escalation, and resolution.

For MaxExchange Remote users, case email notification is not available.

➤ To create email templates for customer service case notification

- For detailed information on how to create email templates for customer service case notification see the “Use Email Templates for Customer Service Case Notification” topic in the Administrator’s Guide. Creation of the templates is done in the Administrator module.

Merge Fields

Merge fields allow you to personalize the case notification emails. When the emails are sent, the fields are replaced by the respective customer service information. For a list of available merge fields, see the Insert Merge Fields dialog box in the Maximizer Word Processor (click the Merge Field button in the editor).

{My_Name?} — the logged-in user’s full name (first name, initial, and last name)

{My_Company?}

{CS.Case_Number?}

{CS.Client_Name?}

{CS.Contact_Name?} — this is not a mandatory case field, therefore, a value may or may not be displayed in the case notification email

The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

{CS.Subject?}

{CS.Assigned_To?} — for assignment or escalation emails only

{CS.Resolved_By?} — for resolution emails only

{CS.Resolved_Date?} — for resolution emails only

{CS.Resolved_Time?} — for resolution emails only

When using the template editor in Administrator to create your templates, you do not have to type in these fields; they are available in the Tools > Merge Fields dialog box.

When you save a file in the Email Template Editor, email templates are automatically stored in the Address Book.

After creating the templates, Administrator's Customer Service tab is used to specify which templates are to be used for each of the four types of case notifications.

Email Users Regarding Case Status

Users, as well as customers, can be automatically emailed when a case is assigned, escalated, or resolved by selecting the "Notify the assigned user by email" option. Whether or not the option is selected, i.e., regardless whether the user is emailed, an email is sent to those users specified as case monitors. See "Monitor Cases" on page 129 to learn more about case monitoring.

The email content sent to users is the same as the email content sent to case monitors.

The email sent to users and case monitors is system-generated and cannot be edited in Maximizer or Administrator. Emails include basic case details such as the following:

Case number: <case number>

Case subject: <case subject>

Case description: <case description>

Company: <Company/Individual name>

Contact: <Contact name>

Assigned to: <user ID> <user name>

Case Owner <case owner>

Case has been modified by <user ID> <user name>

'ABC' field changed, from 'X' to 'Y'

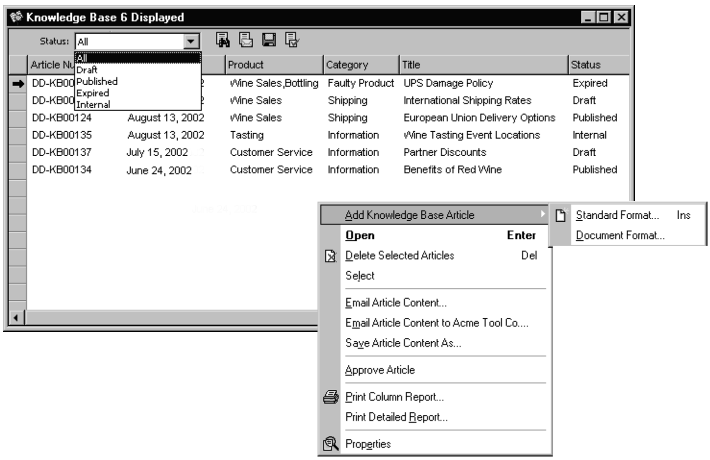
The "from" email address is the same as the "from" address in the Email window (the current email profile). If you are using Employee Portal, the "from" address is the same as the logged in user's email address. If you are using Customer Portal or Partner Portal, the "from" address is the same as the Webuser's email address, which is set up in Administrator's Users dialog box.

Record Case Solutions in a Knowledge Base

The Knowledge Base window provides you with a library-style tool to manage your customer service solutions; the window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

While working in the Knowledge Base window, keep the following points in mind:

- Find articles using the **Search** button.
- **Article numbers** are automatically generated by Maximizer.
- An **article's status** determines who can view the article.
- Right-click in the Knowledge Base window to access frequently-used menu items.



Articles can be added in two formats: standard (text) or document (file attachment).

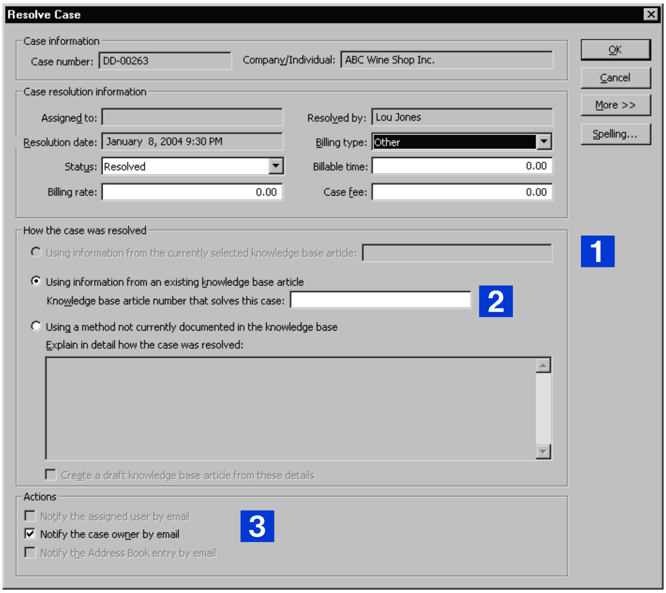
The Knowledge Base window displays articles according to number, last modified date, product, category, title and status. Click on a column heading to sort the articles by the column subject matter. To pop up a convenient list of commands to manage articles, click your right mouse button.

Record a Case Solution

When you resolve a customer service case, you can type an explanation of how the case was resolved and jot down keywords that best identify the article content. Or, if an existing knowledge base article was used to solve the case, you can assign the article number to the case.

➤ To record a case solution

1. If an existing article helped resolve the case, select it in the **Knowledge Base** window or make a note of the number before resolving the case.
2. If a **new method** helped resolve the case, type in an explanation.
3. Choose to **notify** the assigned user, case owner, or associated Address Book entry of the case status by email. Even when these options are deselected, case monitors receive an email.



A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users. Articles can also have a status of internal, published, or expired. The status determines who can read or modify the article. See "Control Who Can Access Articles" on page 135 for more information.

Add an Article to the Knowledge Base

In a similar way to the Company Library, the Knowledge Base window provides a location for general customer service collateral. So articles do not always need to be associated with a specific case.

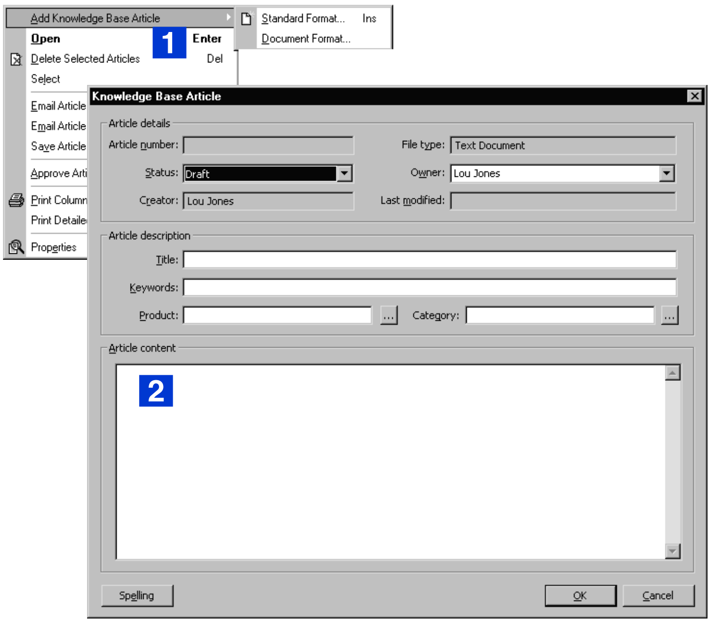
There are two ways to add an article that is not associated with a case: using the standard (text) format and the document (file attachment) format. If the article content is short and straightforward, the former option should suffice. However, if you

want to carefully compose the article over a day or two, confirm data with an external source, or run a spell check, you may wish to write the document in Microsoft Word, for example, and then attach the article as a document. When attaching the file, you can browse to any folder on your computer or network to which you have access.

➤ To add a knowledge article

1 Right-click and choose **Add Knowledge Base Article**. Choose Standard Format or Document Format.

2 If you chose the **Standard** format, you would type your article text here. If you chose the **Document** format, you must browse and select an existing file.



Control Who Can Access Articles

A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users. Articles can also have a status of draft, internal, published, or expired. The status determines which users can read or modify articles:

- **Draft** articles can be viewed and modified by the creator, owner (user or security group), and approvers.

- **Internal** articles can be viewed by all users who have knowledge base read rights, excluding external Maximizer portal users (customers and partners).
- **Published** articles can be viewed by all users who have knowledge base read rights, including external Maximizer portal users (customers and partners), and modified by approvers.
- **Expired** articles can be viewed and modified by the creator, owner (user or security group), and approvers.

The knowledge base ensures that valuable case solutions are recorded, reviewed for quality assurance, and made available to the appropriate users.

Save and Email an Article

Any article can be saved or emailed. However, due to a file naming convention, an article title containing the following characters cannot be emailed or saved:

? / * : " | \ < >

If you want to email or save the contents of an article that contain these characters in the file name or article title, Maximizer automatically replaces them with underscores so the file can be emailed or saved.

Find Articles

You can search the Address Book's knowledge base for any article that matches the basic article fields you specify, such as creator, owner, and last modification date. To find all articles, leave all the fields blank.

The Search by Phrase option searches the article title and keywords and can be fine-tuned using the following options:

- Article contains all of the words in phrase — searches for *every* word you specified.
- Article contains the exact phrase — searches for the words in the exact order you specified.
- Article contains at least one of the words in phrase — searches for at least one of the words you specified.

You can choose to search the article content, as well as the title and keywords, using the "Include article body contents when executing search" option. Once selected, the three search options just described apply to the article content, as well as to the title and keywords.

If you are running Maximizer on a SQL server, the Full-Text Search engine must be installed in order to search article content; if this option is grayed out, contact your system administrator or see the Maximizer Enterprise Administrator's Guide for information on how to enable the full-text search in SQL.

While any file format can be attached as an article, the content of only the following file types can be searched:

- Microsoft Word (*.doc)
- Microsoft Excel (*.xls)
- Microsoft PowerPoint (*.ppt)
- Text (*.txt)
- HTML (*.htm)

CHAPTER 8

Using QuickBooks with Maximizer

Integrate Accounting with Maximizer Enterprise

In this chapter...

Connect to QuickBooks with Maximizer

Maximizer offers an Accounting Link Designed for Use with QuickBooks®. The Accounting Link enables you to create estimates, invoices, and purchase orders from within Maximizer, which automatically creates them in the QuickBooks Company file. It includes support for both the U.S. and Canadian versions of QuickBooks Pro 2003 and QuickBooks Pro 2004. During the installation process, ensure you choose the version that corresponds to your version of QuickBooks.

It's important that your Accounting Link Designed for Use with QuickBooks and Maximizer are configured before proceeding to work with the Accounting tab in Maximizer. Otherwise, the procedures outlined in this chapter will not work properly. For installation and configuration instructions, refer to the Administrator's Guide.

Before you can use the Accounting Link feature of Maximizer, you or your system administrator must configure Maximizer for your QuickBooks accounting software.

You can configure the Accounting Link to operate in different ways:

- **Local**—Maximizer connects to a QuickBooks Company file on the same machine.
- **Client/Server**—Maximizer (client) connects to a QuickBooks Company file on another machine (server). In a client/server environment, multiple Maximizer machines can connect to the same QuickBooks Company file on the server.

Connect to a Local QuickBooks Company File

When you are running both QuickBooks® and Maximizer, and you are closing your applications, make sure you shut down Maximizer before shutting down QuickBooks. Otherwise, the programs will not exit properly.

If the Accounting Link Designed for Use with QuickBooks has been installed and configured to connect locally (i.e., QuickBooks is installed on the same machine as Maximizer), all you need to do is run Maximizer, and you are automatically connected to the QuickBooks Company file.

Connect to a Remote QuickBooks Company File

Depending on how your system administrator installed and configured the QuickBooks client on your machine, you may just have to run Maximizer and log in as usual, and you will have all the QuickBooks functionality available to you. Otherwise, you may need to complete a few additional steps before you're ready to start creating invoices, estimates, and purchase orders. The following procedure explains how to complete these additional steps.

➤ To connect to a remote QuickBooks Company file

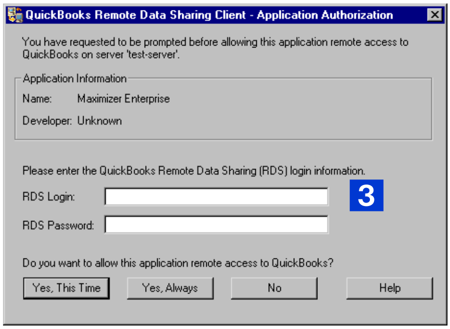
If you re-link a Company file to a different Address Book, all of your Address Book entries must also be re-linked.

If the application authorization process has been done, skip step 3. You will not be prompted with this dialog box if this step has been done.

1. Run **Maximizer**.
2. Log into the **Address Book**.

   Maximizer connects to QuickBooks.

3. In the QuickBooks Remote Data Sharing Client - Application Authorization dialog box, enter the **RDS Login** and **RDS Password** and click **Yes, Always** to continue.



You are now ready to use the Accounting Link Designed for Use with QuickBooks.

Link Address Book Entries

Before you can create any invoices, estimates, or purchase orders in Maximizer, you must create a link between each Maximizer Address Book entry and QuickBooks customer or vendor.

- If the customer or vendor record does not exist in the QuickBooks Company file, you can create the QuickBooks record from Maximizer using an existing Maximizer Address Book entry.
- If the customer or vendor record does exist in the QuickBooks Company file, Maximizer creates a connection between the records.

After you have linked an Address Book entry, you can create and view QuickBooks invoices, estimates, and purchase orders from within Maximizer.

➤ To link an Address Book entry to QuickBooks

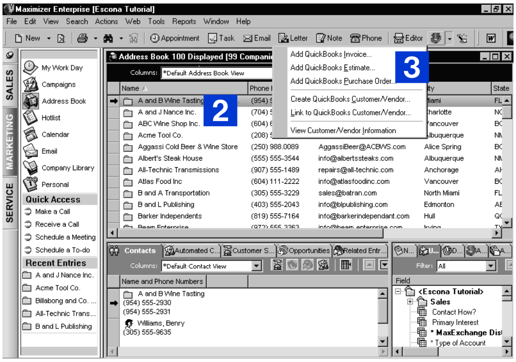
1 Open your Maximizer **Address Book**.

2 Select the **Company** or **Individual** to link with QuickBooks.

– or –

If the Company or Individual exists in QuickBooks, but not in Maximizer, create a new Address Book entry in Maximizer.

3 In Maximizer, select the Accounting drop-down menu, and click **Link to QuickBooks Customer/Vendor**.



ⓘ You can expand your search by entering only the first few letters of the Company or Individual name in the Name field.

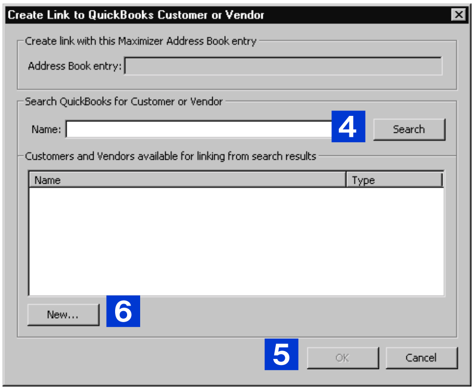
4 Click **Search** to display a list of matching customers and/or vendors in QuickBooks, if any.

5 If a matching entry appears in the list, select the entry and click **OK** to link the Address Book entry with the QuickBooks customer/vendor.

If you were able to complete step 5, then skip the remainder of this procedure. The records are linked, and you can create purchase orders (vendors) or invoices and estimates (customers) for that Company or Individual.

The OK button is disabled until you select a QuickBooks record from the list of search results.

6 If a matching entry does not appear in the list, click **New**.



The Add Accounting Customer/Vendor dialog box opens. Maximizer automatically fills in any existing contact information.

7 Select the **Customer** option to create the Address Book entry as a customer in QuickBooks. (You can create invoices and estimates for customers.)

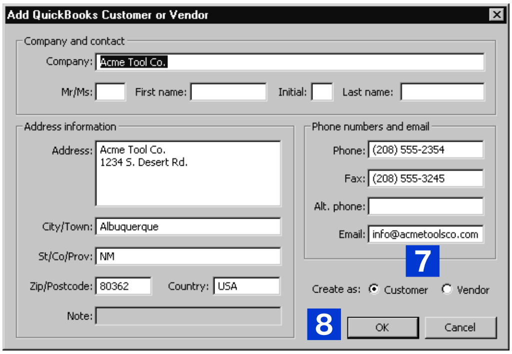
– or –

Select the **Vendor** option to create the Address Book entry as a vendor in QuickBooks. (You can create purchase orders for vendors.)

If you know the entry does not exist in your Company file, you can select the Create QuickBooks Customer/Vendor from the Accounting menu in Maximizer while the Address Book entry is selected.

8 Click **OK**.

Maximizer and QuickBooks now share a connection between these records.



Create Invoices, Estimates, and Purchase Orders

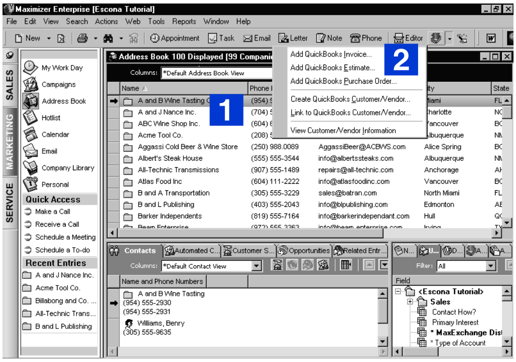
You can create invoices, estimates, and purchase orders in Maximizer, and they will automatically be created in QuickBooks as well. Before you can create any of these transactions, the Company or Individual must be linked to either a customer or vendor record in QuickBooks:

- To create an invoice or estimate, the Address Book entry must be linked to a QuickBooks customer record.
- To create a purchase order, the Address Book entry must be linked to a QuickBooks vendor record.

➤ To create an invoice, estimate, or purchase order

1. In Maximizer, open the **Address Book** and select the Company or Individual for whom to create an invoice, estimate, or purchase order.

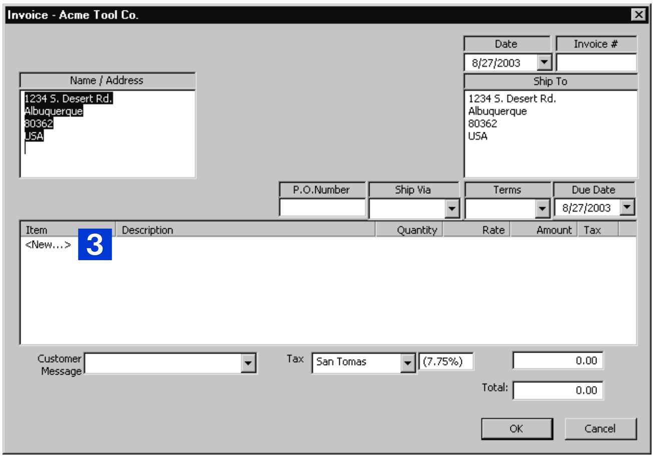
2. Open the Accounting drop-down menu, and select **Add QuickBooks Invoice**, **Add QuickBooks Estimate**, or **Add QuickBooks Purchase Order**.



The Invoice, Estimate, or Purchase Order dialog box opens. Maximizer automatically fills in the customer or vendor name and address, the date, and any tax information.

You cannot enter a value in the Invoice #, Estimate #, or P.O. Number field. When you click OK, QuickBooks assigns the number automatically and the value is then read-only.

3 In the **Item** column, click on **New**.

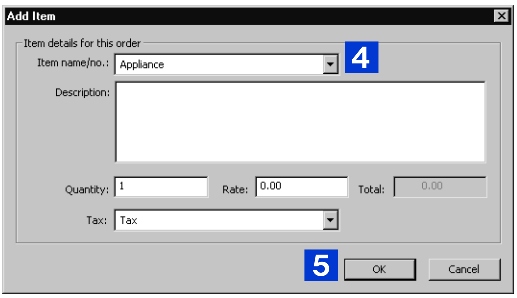


For detailed information about any of these fields, select the dialog box, and press F1.

The Add Item dialog box opens.

4 Select the item **name** or **number** from the drop-down list.

5 Add or change any of the other information in the Add Item dialog box, as required, and click **OK**.



The Add Item dialog box closes, and the item appears on the invoice, estimate, or purchase order.

6 Repeat the last three steps until all required items have been added to the transaction.

7 Complete any remaining fields on the transaction, as required, and click **OK**.

The transaction has now been created in both Maximizer and QuickBooks, and Maximizer creates a history note in the Notes window of the Address Book. You can also view the invoice, estimate, or purchase order from the Accounting tab of the

Maximizer Address Book following window, as described in the following section.

View Invoices, Estimates, and Purchase Orders

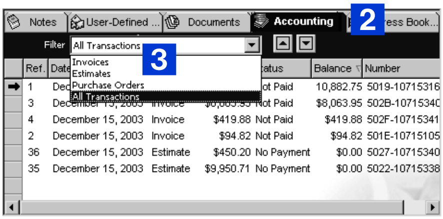
You can view existing invoices, estimates, and/or purchase orders for a customer or vendor from within Maximizer, even if the transaction was not created in Maximizer. When you link a Maximizer Address Book entry to a QuickBooks customer or vendor, existing invoices, estimates, or purchase orders display in Maximizer automatically.

You can view existing transactions in the Accounting tab of the Maximizer Address Book following window.

➤ To view an invoice, estimate, or purchase order

1. In Maximizer, open the Address Book and select the Company or Individual for whom to view a transaction.
2. Click the **Accounting** tab.
3. Open the **Filter** drop-down list, and select **Invoices**, **Estimates**, **Purchase Orders**, or **All Transactions**.

   The transactions of that type for the selected customer or vendor appear. You can double-click any item to view the details.



View Accounting Details about a Customer or Vendor

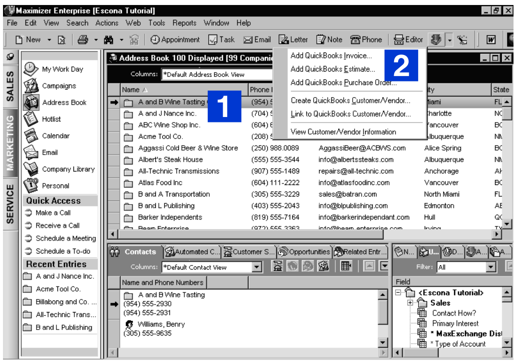
Maximizer enables you to view the following accounting details about a customer or vendor from within Maximizer:

- customer balance
- aged analysis (30, 60, and 90 day balances)
- credit limit
- remaining available credit

➤ To view QuickBooks accounting details

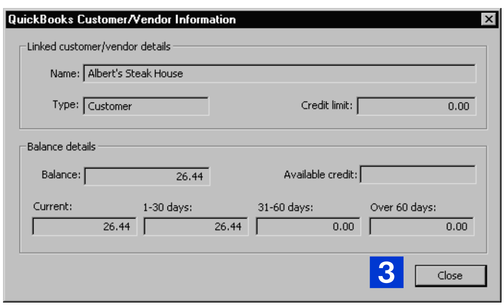
1 In Maximizer, open the Address Book and select the Company or Individual for whom you want to view accounting details.

2 Open the Accounting drop-down menu, and select **View Customer/Vendor Info**.



The QuickBooks Link Information dialog box opens. This dialog box contains the accounting detail information for the selected Company or Individual.

3 View the accounting details in the dialog box, and click **Close** when you are finished.



CHAPTER 9

Accessing Maximizer on the Web

Use Maximizer Around the Globe

In this chapter...

Maximizer on the Web

The Maximizer Portals are available if you're running Maximizer on a Microsoft SQL database (eCRM Suite).

For many organizations, it's impractical to send an entire database to each remote machine—the database may be too large; there may be concerns about distributing valuable lead and customer information; or there may be a concern about connection times and the amount of data being sent.

Maximizer's web portals give remote users access to the central Maximizer database via the web. Remote users can access and work with Address Book entries as they would in Maximizer at the office.

Remote users need only a web browser, Maximizer user ID, and password. A travelling business person could step into a web café or borrow someone's computer to quickly connect to the home office Address Book. Once online, it's easy to work with contact data, check Hotlist tasks and calendar appointments, customer service cases, and opportunities.

Maximizer's portals provide Maximizer database access to people who don't have Maximizer installed. A company could have its distributor list in Maximizer and allow web access to that list so any other member of the channel—with the proper password—could go online and browse the distributor directory.

Maximizer on the Web has four components—Employee Portal, Wireless Employee Portal, Partner Portal, and Customer Portal. Another portal is provided to interface a Maximizer eStore with a specific Address Book.

Employee Portal

You can access the sample Escona Address Book using "jnapoli" as the user ID and "password" as the password.

You can access the Employee Portal through the Start menu or by entering its URL in a browser.

➤ To access Employee Portal

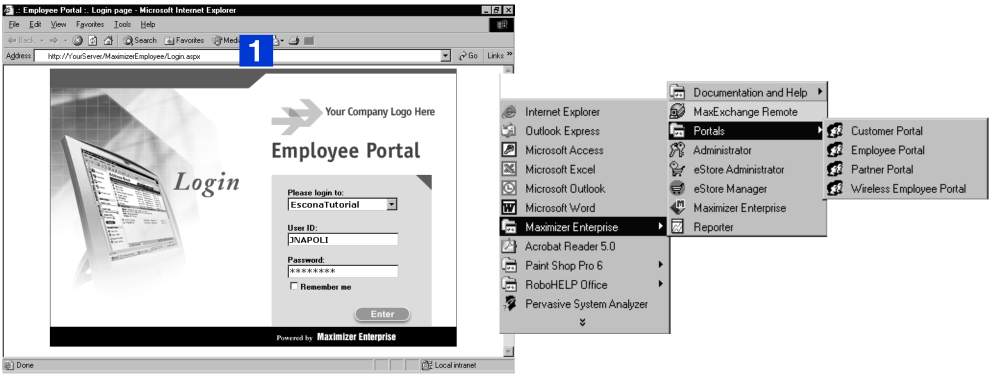
1. To access the Employee Portal through its URL, enter the **URL** in any web browser. The URL is set by your system administrator. Typically, the URL would look like the following:

   http://[YourServerName]/MaximizerEmployee/Login.aspx

   – or –

   To access the portal through the Start menu, choose **Start > Programs > Maximizer Enterprise > Portals > Employee Portal**.

2. Select the **Address Book** you want to open, and enter your **User ID** and **password**.



Employee Portal Main Pages

To move from one main page of the portal to another, use the icons in the icon bar. You can also use your browser's Back button to move to the previous page you had open.

Employee Portal allows you to access your company information on the web. Most of the tasks you would perform in Maximizer can be done in the Employee Portal.

The My Work Day page is the first view you see when you open the Employee Portal. To view an overview of your work day, use the My Work Day page to see the day's tasks, appointments, and your company announcements. This page works the same way it does in Maximizer. For more information, see "My Work Day View" on page 23.

The main Address Book page contains all your Address Book entries. Employee Portal does not open with a list of entries; you must perform a search for entries. For more information on searching for entries, see "Search for Address Book Entries" on page 153.

➤ To work in the main Address Book window

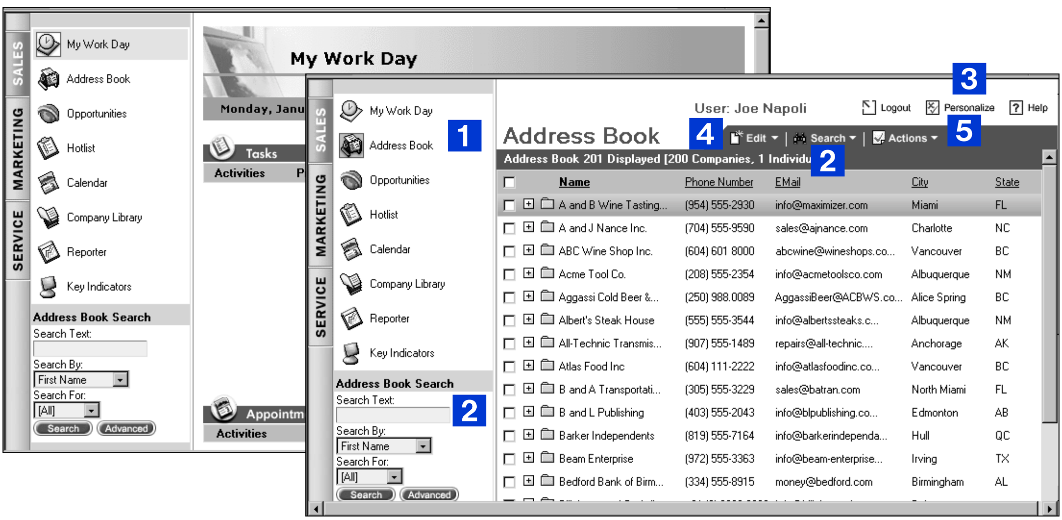
1 Use the **icons** to access the main modules in the portal.

2 Perform **quick or advanced searches** for Address book entries.

3 Set your Employee Portal personal preferences for searching, the Calendar window, and user-defined fields by clicking on the **Personalize** button.

4 Use the **Edit** button to add new Companies, Individuals, and Contacts.

5 Use the **Actions >>** button to perform common actions such as scheduling an appointment.



Search for Address Book Entries

There are a few different ways to search for Address Book entries. You can use the Search and Advanced search options in the navigation pane or use the Search menu. The Search option provides you a quick way to find specific information. For a more advanced search, you can use the Advanced option to do a search by all fields, or you can choose one of the options from the Search menu.

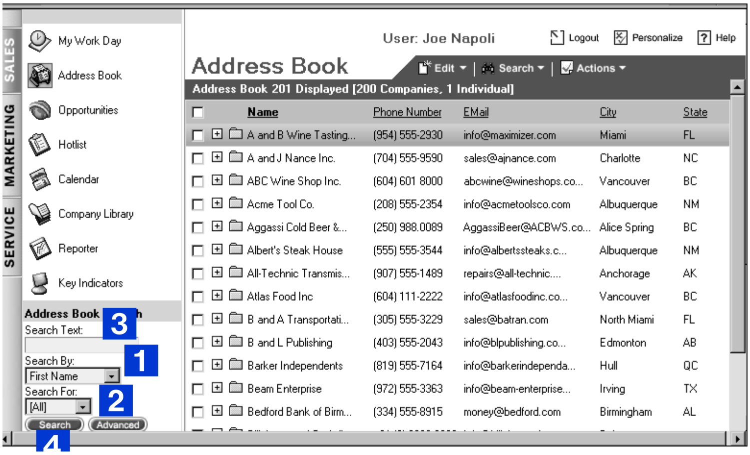
The default number of Address Book entries displayed after a search is 500. Click the Personalize option to change this setting and other Employee Portal preferences.

➤ To search using the navigation bar Search option

1. In the Address Book page, select the **basic information** by which you would like to search in the Search By drop-down list. You can search by first or last name, phone number, or company name.
2. Select the **type** of entry for which you are searching in the Search For drop-down list. You can search for Companies, Individuals, and Contacts. The People option searches both Individuals and Contacts. Or, you can search all entries in the Address Book.
3. Depending on what you are searching for, enter the exact first/last name of the Company, Contact, or Individual or the phone number in the Search Text field. You can also enter just the first few letters of the name or phone number. An example of this would be to enter “hen” for Henderson Ltd., or “h” to see all entries beginning with the letter “h”.

Depending on the speed of your Internet connection, a broad search of your Address Book may take a long time to display. So, if you’re looking for Henderson Ltd., for example, do an Exact Match search on “Henderson Ltd.”, rather than searching on “h” or “he”.

4 Click the **Search** button when you've selected your search criteria.



➤ To search using the navigation bar Advanced option

1 In the Address Book page, click the **Advanced** button. The Search by All Fields dialog box appears.

2 In the Search by All Fields dialog box, click the **Add** button.

3 In the Select Fields for Search dialog box, select one or more fields and click **OK**.

4 In the Values for Search dialog box, select one or more **values** and click **OK**. For each field you've chosen for the previous step, you will be prompted to specify the values. Use the search condition options to further narrow your search.

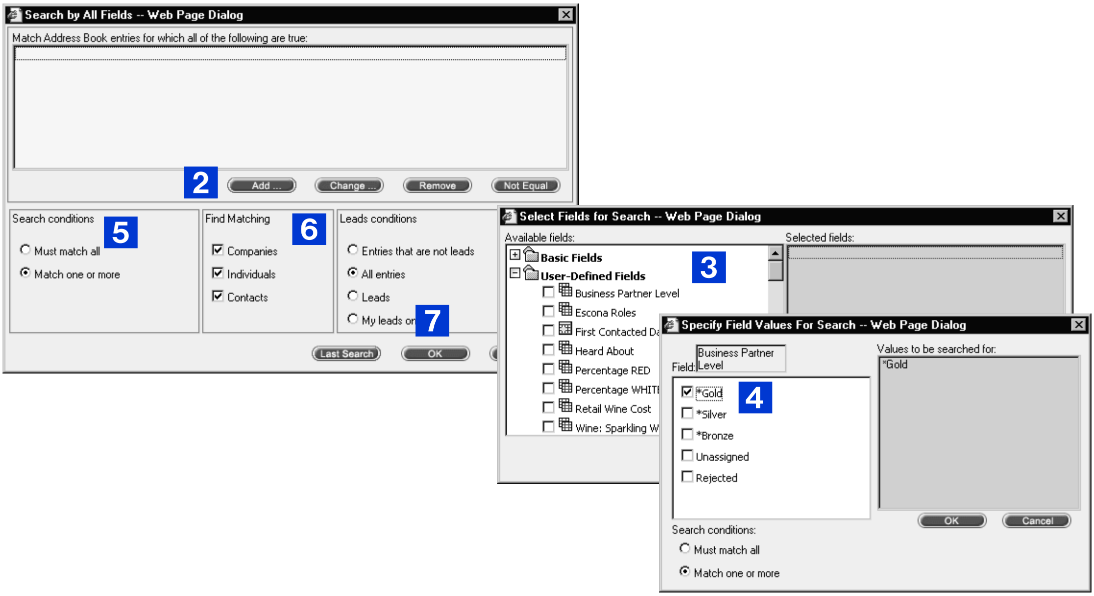
5 Specify the remaining **search criteria** in the Search by All Fields dialog box.

If you wish to build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

6 The matching entries in the Address Book will replace the current Address Book entry list. Select an option according to how you would like the current list to be updated. You can choose to further narrow the search by specifying options to include or omit sales leads.

ⓘ Use the Last Search button to perform previously defined searches.

7 Click **OK** to begin the search.



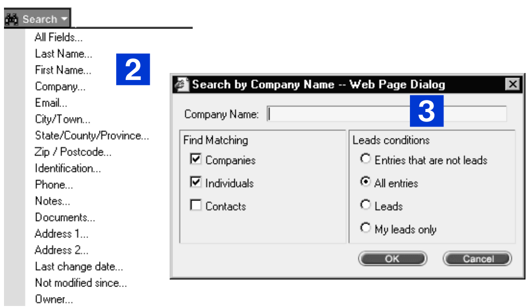
➤ To search using the Search menu options

If you are searching by all fields, follow the Advanced Search instructions.

1 In the Address Book page, click the **Search** button. A list of searching options appears.

2 Select the **field** by which you would like to search.

3 In the Search By dialog box, select the **types** of entries you want to retrieve. If you are searching for a specific entry, enter the exact text for which you are searching. If you leave the main search text blank, all entries are retrieved. For example, if you search by Company Name and leave the field blank, all Companies in the Address Book are retrieved.



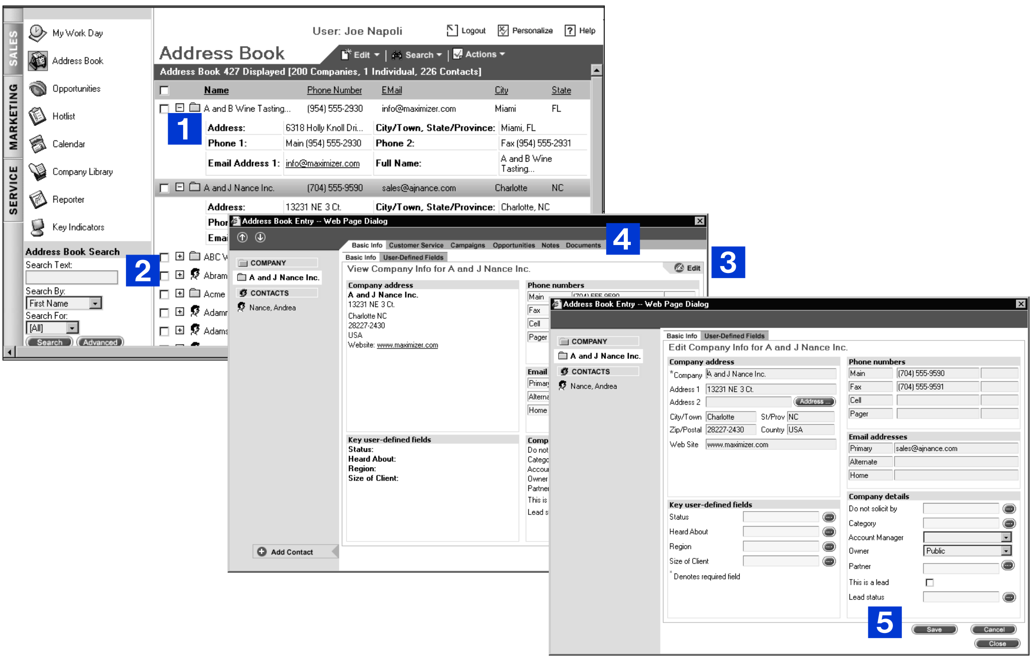
View and Modify Address Book Entries

Encrypted user-defined fields are not searchable through Employee Portal, therefore, they do not display in the user-defined fields drop-down list.

After entering your search criteria in the Address Book page and clicking OK, the entries that match the text you entered are displayed in the Address Book page.

➤ To view and modify Address Book entries

1. To view the details of a Address Book entry at a glance, click the **plus sign**. To view the detailed information for an entry, click on the entry.
2. To select entries, click on the **checkbox** on the far left side of the entry. Selection is used to delete entries.
3. When you open an Address Book entry, you can modify the details of the entry by clicking the **Edit** button on the Basic Info tab.
4. With an Address Book entry open, you can view and modify other information related to the entry by clicking the associated tab—Customer Service, Campaigns, Opportunities, Notes, and Documents. See the following sections for more information on each of these elements.
5. Click **Save** when you modify an Address Book entry.



Add Address Book Entries

Adding an Address Book entry in Employee Portal is very straightforward—it's similar to using Maximizer. New entries are added via the portal to your Maximizer Address Book back at the office.

➤ To add a new Address Book entry

1. In the Address Book page, click on the **Edit** button and choose Add Company, Add Individual, or Add Contact For. Similarly, you can select one of the Lead options to add the entry as a lead type of entry.

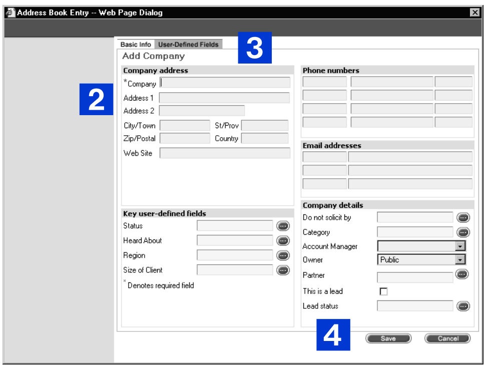
2. Fill in the entry's information. You can use the **Tab** key to move from field to field.

   When entering the phone numbers for the entry, keep in mind that the first field is for the type of phone e.g., fax, and that the third field is for an optional extension number. When entering email addresses, the first field is for the type of email address.

   The Key User-Defined fields are set up by your administrator. These fields are commonly-used fields that are specific to your company. The Details fields belong to each type of entry by default. The values for the Category field are set up in Administrator.

3. Click the **User-Defined Fields** tab. Click on a field to add a value specific to the Address Book entry. Select the Show Blank Fields option to see all user-defined fields in the Address Book.

4. Click the **Save** button once you have filled in the details.



View, Modify, and Add Notes

Notes display in chronological order.

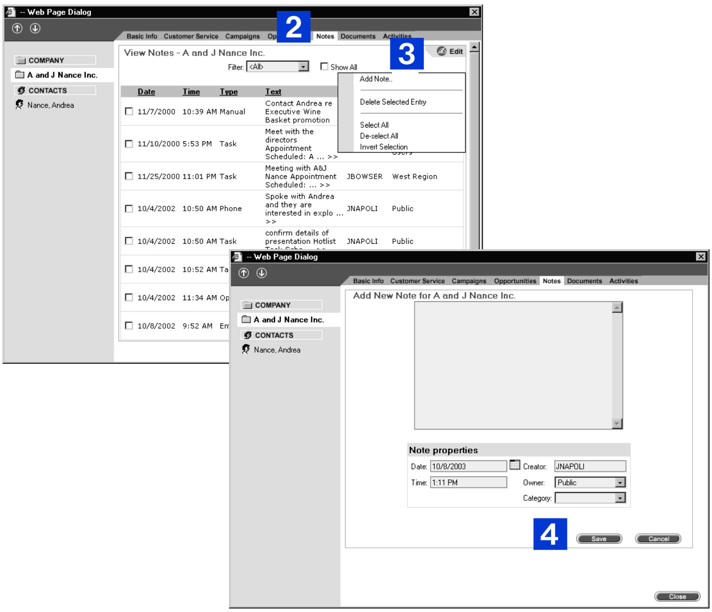
You can view, edit, and add notes for Address Book entries just as you would in Maximizer.

➤ To view, modify, or add a note

1. If necessary, first run a **search** to locate the Address Book entry for which you are adding the note.
2. Open the entry by clicking on it and then click the **Notes** tab.
3. To add a note, click the **Edit** button and choose Add Note. You can control who can see this note by choosing a certain user or security group as the owner. Otherwise, the note is public to all users in the Address Book. If your system administrator has set up custom note types—called categories—you can select a category.

   To edit or view a note, click on the note.

   To delete a note, select the checkbox on the left of the note, click the Edit button, and choose Delete Selected Entry.
4. Click the **Save** button to save any changes and return to the Notes page. Clicking Close returns you to the Address Book page.

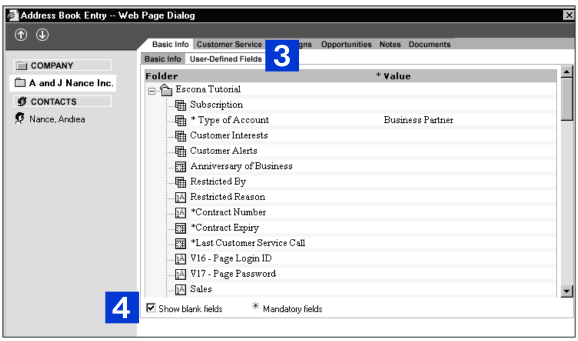


View User-Defined Fields

User-defined fields are custom fields used to further categorize Address Book information. Typically, these fields are set up by your system administrator in Administrator, however, users who have been given the access rights can set up user-defined fields in Maximizer. You cannot use Employee Portal to add, modify, or remove user-defined fields or user-defined field values.

➤ To view user-defined fields

1. If necessary, first run a **search** to locate the Address Book entry for which you are adding the note.
2. Open the entry by clicking on it and then click the **Edit** button.
3. Click on the **User-Defined Fields** tab.
4. Click the **Show Blanks** option to view all user-defined fields. Mandatory fields are denoted by a red-star graphic. User-defined fields and field values are created in Administrator or in Maximizer when the logged-in user has appropriate rights.



View, Modify, and Add Alternate Mailing Addresses

The main address is added to the Basic Info tab of an Address Book entry in Employee Portal and alternate address information is added by clicking the Address button on the Basic Info tab.

➤ To view, modify, or add alternate addresses

1. If necessary, first run a **search** to locate the Address Book entry.
2. Open the entry by clicking on it and then click the **Edit** button.

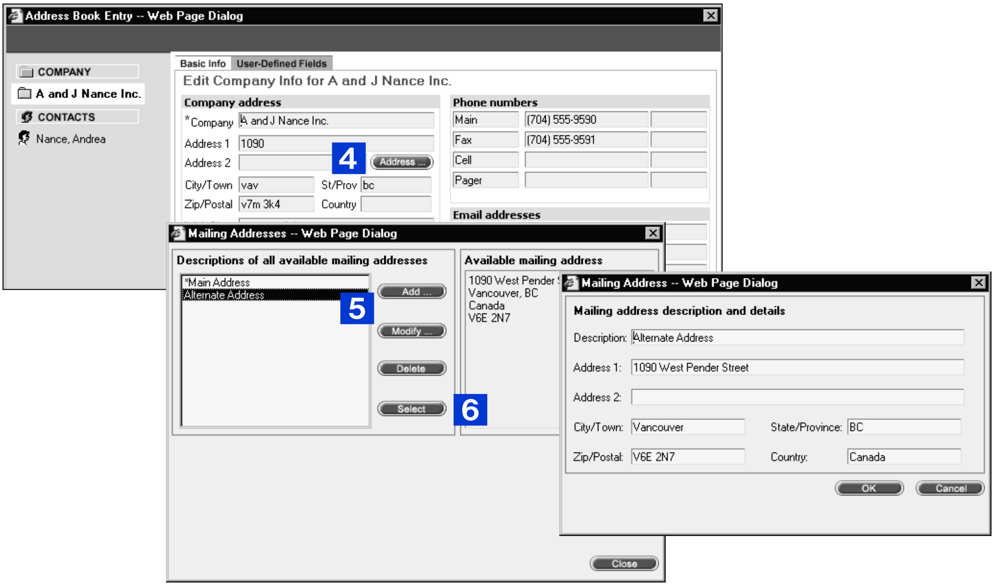
3 Click the **Edit** button. Address button in the Basic Info page and click Add or Edit.

4 Click the **Address** button. The Mailing Addresses dialog box appears.

5 Click **Add** to enter an alternate address. If you are modifying an address, select the address and click **Modify**.

The Main Address cannot be edited in the Mailing Address page.

6 After adding or editing an alternate address, you can set it as the default (or main) address by clicking the **Select** button while the address is selected. The alternate address then appears in the Basic Info page.



View and Delete Documents

You can view an Address Book entry's documents and document properties in Employee Portal. Documents can also be deleted in the Employee Portal. To add a document, do so in Maximizer.

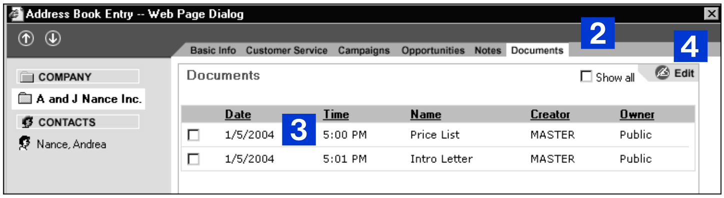
➤ To view or delete an Address Book entry's document

1 If necessary, first run a **search** to locate the associated Address Book entry.

2 Open the entry by clicking on it and click the **Documents** tab.

3 To view the contents of a **document**, click on it. This downloads the document to the Employee Portal.

4 To delete a document, select the checkbox on the left of the document, click the **Edit** button, and choose **Delete Selected Entry**.



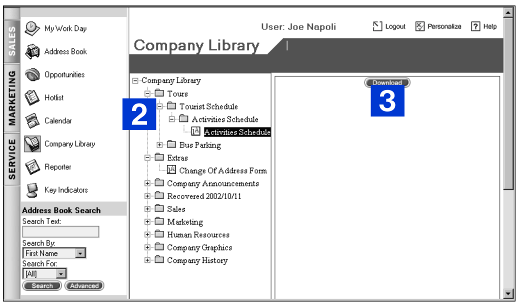
➤ To view documents in the Company Library

1 To view Company Library documents, click the **Company Library icon** in the icon bar. Employee Portal displays the same tree-type folder view as Maximizer.

2 To expand a folder, click on the **plus sign** shown on the left side of the folder.

3 Select a document and click the **Download** button.

Not all document types can be opened in Employee Portal, even if they can be opened in Maximizer. Only Microsoft Word, Microsoft Excel, Microsoft PowerPoint, bitmaps, and jpg files, as well as Company Library notes, can be opened in Employee Portal.



Work with Your Hotlist

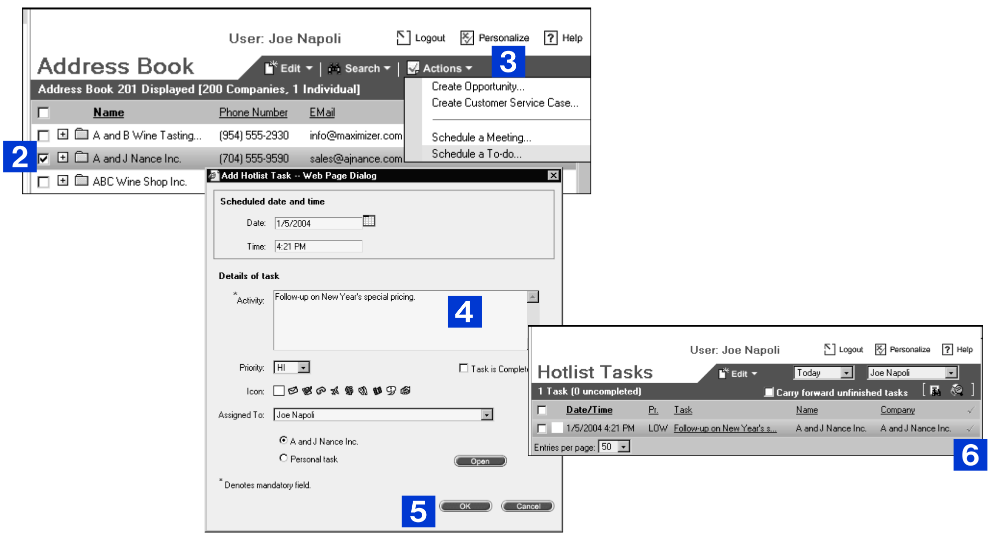
Hotlist tasks scheduled for the present or a future date appear in Employee Portal. Past tasks can be viewed in Maximizer only.

When you click the Hotlist tab on the top navigation bar, Employee Portal displays the current day's tasks by default.

Add and Delete Activities

If you have an Address Book entry open, and want to view its associated Hotlist tasks, you can do so in the Hotlist page. You can also view and modify a Hotlist task.

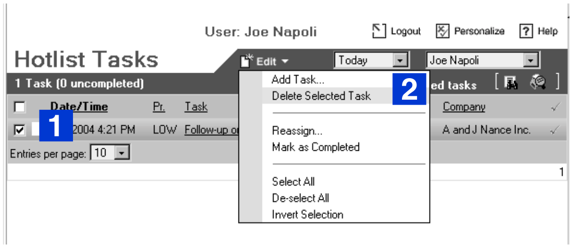
1. If necessary, first run a **search** to locate the Address Book entry.
2. Select the entry by clicking in the far-left **checkbox** in the Address Book list.
3. Click the **Actions** button and choose Schedule a To-Do.
4. Enter the Hotlist task details. You can make the task personal by choosing the corresponding option.
5. Click **OK** to close and save the Hotlist task. You can now view the task in the Hotlist page.
6. To mark a task as complete, click on the **task** in the Hotlist window and select the **Task is Completed** checkbox. A check mark appears in the last column of the task.



➤ To delete a Hotlist task

1 In the Hotlist page, select the **Hotlist task**.

2 Click the **Edit** button and choose **Delete Selected Task**.



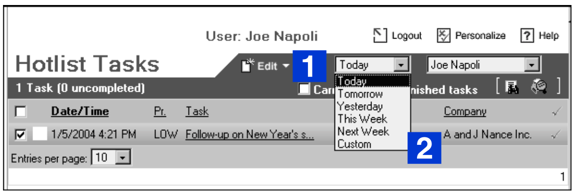
View Hotlist Tasks

To view other user's Hotlist, the user must give you access in Maximizer's File > Preferences > Calendar/Hotlist tab.

➤ To view Hotlist tasks

1 You can then choose to view Hotlist tasks scheduled for tomorrow, yesterday, this week, or next week by selecting the appropriate option from the **View bar** in the Hotlist window. Remember to select the Address Book entry before clicking the Hotlist task window to see all of the entry's associated tasks.

2 You can even choose to view a custom date range where you specify a **From** and **To date**.

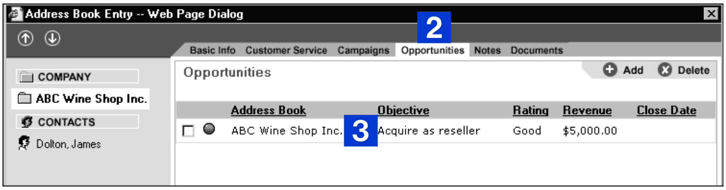


Work with Opportunities

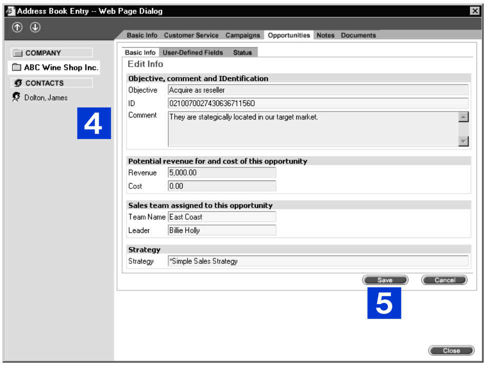
From the Opportunities page in Employee Portal, you can view, edit and add opportunities in your Address Book. Employee Portal provides most of the fields for describing opportunities as in Maximizer.

➤ To view or modify an opportunity for an Address Book

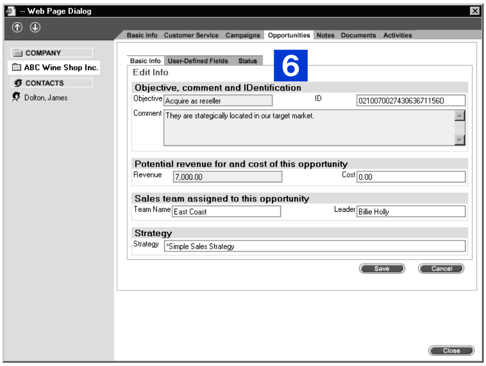
1. If necessary, first run a **search** to locate the Address Book entry associated with the opportunity.
2. Open the entry by clicking on it and click the **Opportunities** tab. All of the opportunities for the selected entry are displayed in the list.
3. Open any of the associated opportunities in the list by clicking on the **opportunity**.



4. You can view and edit all the associated opportunity information.
5. If you are modifying an opportunity, make your changes and click **Save**. Clicking Cancel does not save any changes you have made. Clicking Close returns you to the Address Book page.



6 You can also view the associated user-defined fields and view or modify the status of an opportunity by clicking on the corresponding tab.



View All Opportunities

Opportunities are displayed chronologically.

➤ To view all opportunities in the Address Book

1 You can view all opportunities in the Address Book by clicking the **Opportunities** icon. All opportunities in the Address Book appear.

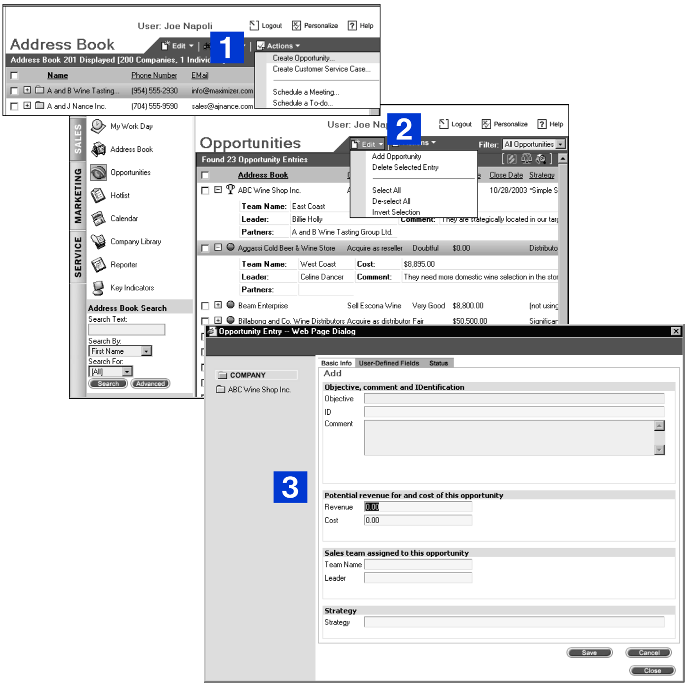
2 To view only opportunities with a specific status, use the **filter** drop-down list to narrow down the list.

3 To view the opportunity summary details without opening it, click the **plus sign** on the left of the opportunity.

Add and Delete Opportunities

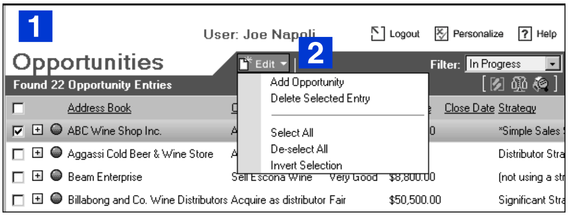
➤ To add an opportunity

1. In the Address Book page, first run a **search** to locate the Address Book entry you wish to be associated with the opportunity. Click the **Actions** button and choose **Create Opportunity**.
2. You can also click the **Edit** button and choose **New Opportunity** in the Opportunities page while a current opportunity is selected for the associated Address Book entry.
3. Enter the opportunity details. Click **Save** when you are finished.



➤ To delete an opportunity

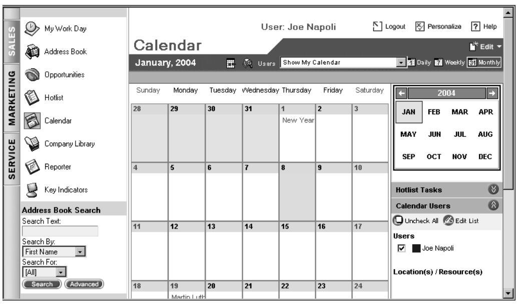
1. From the **Opportunities** page, select the checkbox on the left side of the opportunity.
2. Click the **Edit** button and choose **Delete Selected Entry**.



Work with Your Calendar

To view other another user's calendar, the user must give you access in Maximizer's File > Preferences > Calendar/ Hotlist tab.

You can schedule, modify, and view appointments in the Employee Portal. The Calendar window in Maximizer is very similar to the Employee Portal Calendar page. See "Calendar Window" on page 47 for more information on the general functionality of the Calendar page.



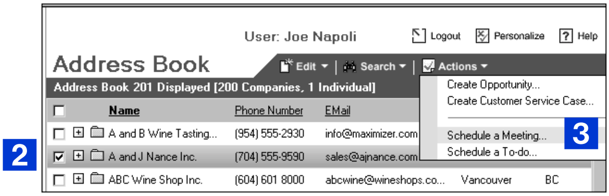
Schedule Appointments

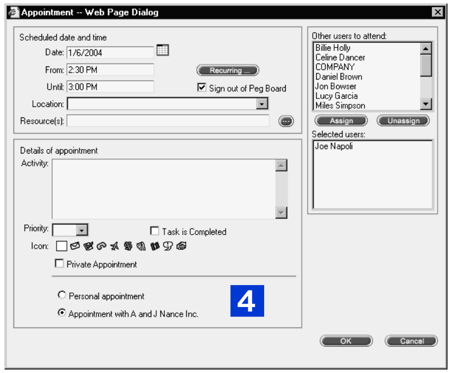
➤ To schedule an appointment associated with an Address Book entry

1. If necessary, first run a **search** to locate the Address Book entry.
2. Select the entry by clicking in the far-left **checkbox** in the Address Book list.

ⓘ Automatic appointment notification does not apply to Employee Portal.

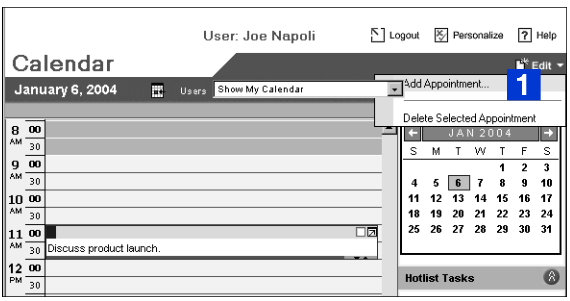
3. Click the **Actions >>** button and choose **Schedule a Meeting**.
4. Enter the appointment details. In the lower portion of the dialog box, you will see that the appointment is associated with your selected Address Book entry. For more information on the appointment fields, refer to “Add a New Appointment to Your Calendar” on page 48.

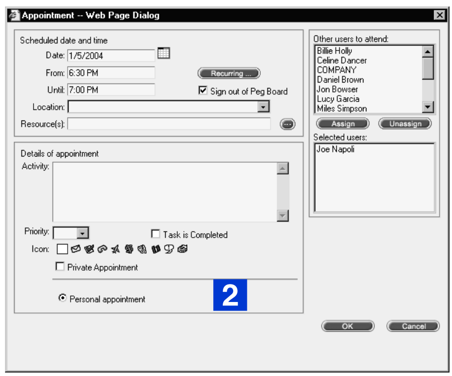




➤ To schedule a personal appointment

1. In the **Calendar** page, click the **Edit** button and choose **Add Appointment**.
2. Enter the appointment details. In the lower portion of the dialog box, you'll see the appointment is marked as personal.

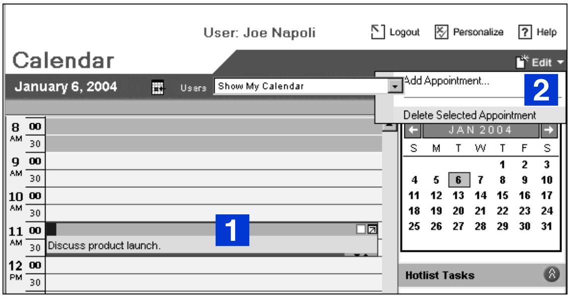




Delete Appointments

➤ To delete an appointment

1. In the **Calendar** page, go to the daily or weekly view and select the appointment.
2. Click the **Edit** button and choose **Delete Selected Appointment**.



Work with Customer Service Cases

From the Customer Service page in Employee Portal, you can view all customer service cases for a Company or Individual or all the cases in the Address Book.

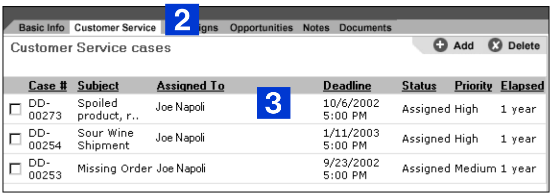
When adding a new case, first search for and open the Address Book entry to which the case applies. You can then click the Add Case button in the Basic Info page or open the Customer Service page and click the Add button.

View Cases

➤ To view or modify a customer service case for an Address Book

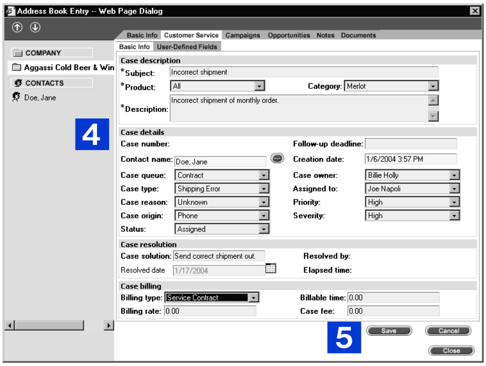
1. If necessary, first run a **search** to locate the Address Book entry associated with the customer service case.
2. Open the entry by clicking on it and click the **Customer Service** tab. All of the customer service cases for the selected entry are displayed in the list.

3 Open any of the associated cases in the list by clicking on the **case**.

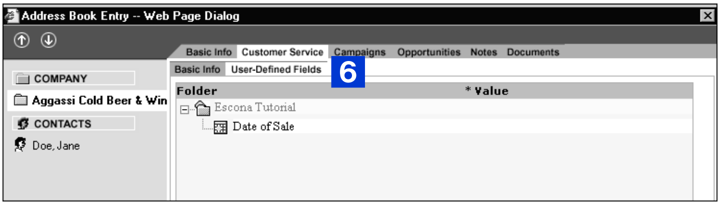


4 You can view and edit all the associated case information.

5 If you are modifying a case, make your changes and click **Save**. Clicking Cancel does not save any changes you have made. Clicking Close returns you to the Address Book page.



6 You can also view the associated user-defined fields by clicking on the corresponding tab.



➤ To view all customer service cases in the Address Book

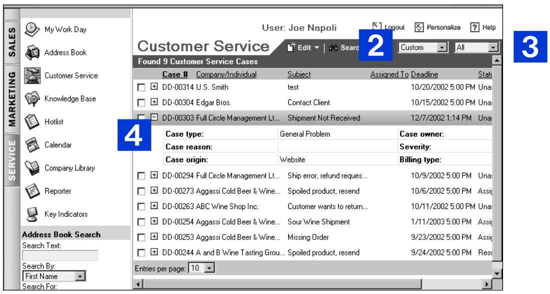
Opportunities are displayed chronologically.

1. You can view all customer service cases in the Address Book by clicking the **Customer Service icon**. All opportunities in the Address Book appear.

2. To filter cases by their follow-up date, choose one of options from the **date filter**. For example, you can choose to view only cases with a follow-up date of Today. Or, choose the Custom option and specify a start and end date for a case follow-up date range.

3. To view only cases in a specific case queue or only your cases, use the **filter** drop-down list to narrow down the list.

4. To view the case summary details without opening it, click the **plus sign** on the left of the case.



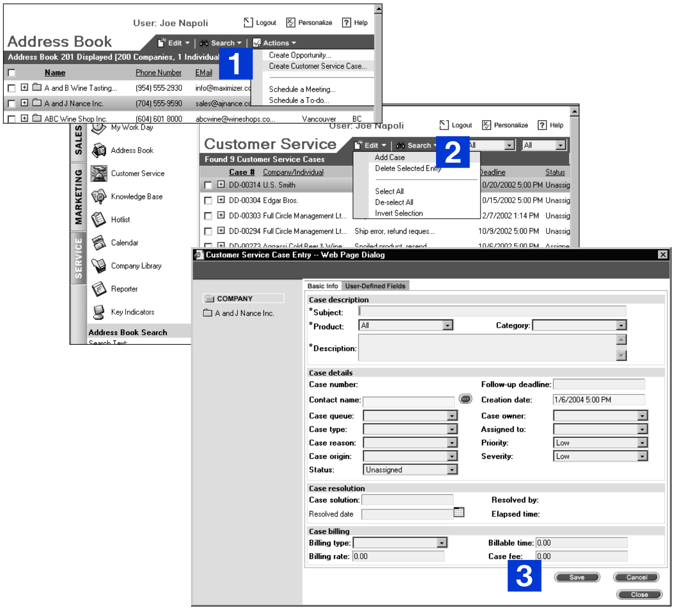
Add Cases

➤ To add a customer service case

1. In the Address Book page, first run a **search** to locate the Address Book entry you wish to be associated with the case. Click the Actions button and choose Create Customer Service Case.

2. You can also click the **Edit** button and choose **Add Case** in the Customer Service page while a current case is selected for the associated Address Book entry.

3 Enter the case details. Click **Save** when you are finished.

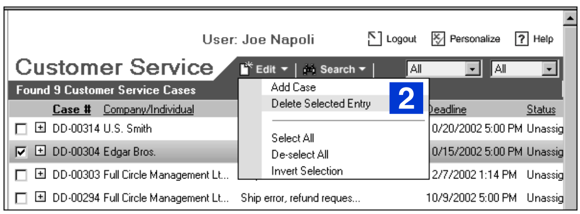


Delete Cases

➤ To delete a case

1 In the **Customer Service** page, select the **checkbox** on the left side of the customer service case.

2 Click the **Edit** button and choose **Delete Selected Entry**.



Work with the Knowledge Base

Access to the knowledge base is very similar to when you are using Maximizer. You can view, modify, and add new articles to the knowledge using Employee Portal.

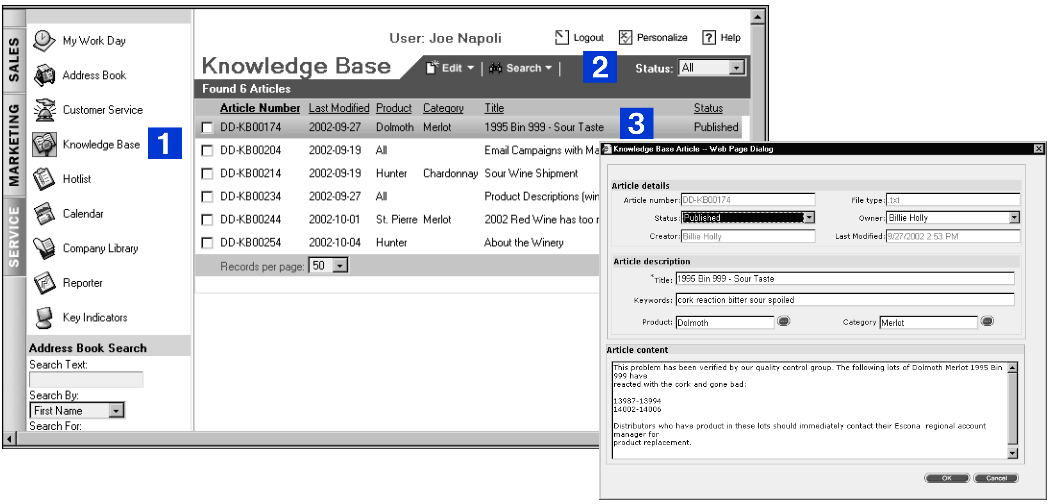
Once approved, the article's status, as viewed in the window, is set to Published or Internal. If the approver designates the article as Published, it is visible to all users, customers (through Customer Portal), and partners (though Partner Portal). If the approver designates the article as Internal, only users may view it. For more information about knowledge base articles, refer to "Record a Case Solution" on page 133.

View Articles

to search for a knowledge base article, click Search and specify a field or phrase.

➤ To view all knowledge articles

1. To view knowledge base articles, click the **Knowledge Base** icon in the icon bar.
2. Use the **Status filter** to view the different types of articles.
3. To open an article, click on the **article**.

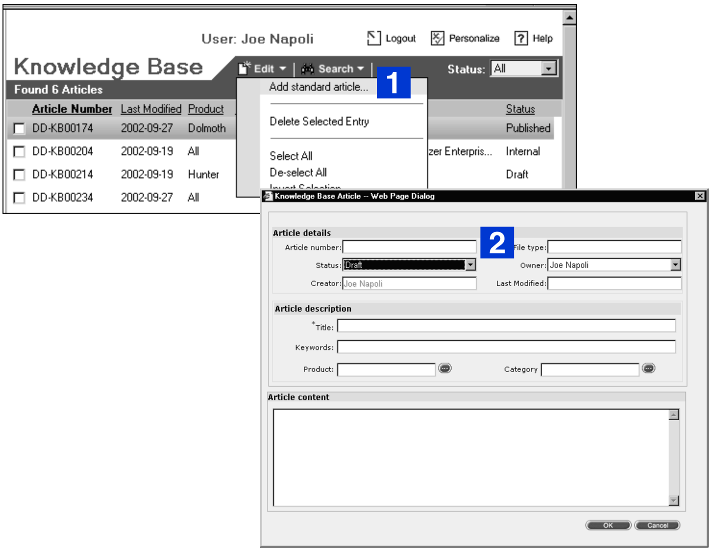


Add Articles

Article numbers are automatically assigned.

➤ To add a knowledge base article

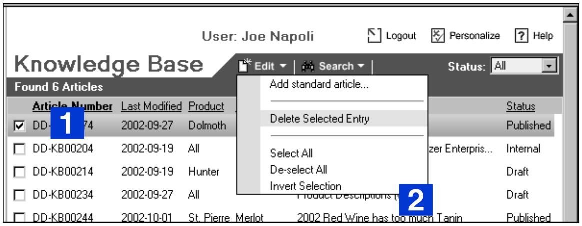
1. In the **Knowledge Base** page, select **Add Standard Article**.
2. Enter the article information. For more information on adding articles to the knowledge base, see "Add an Article to the Knowledge Base" on page 134. All knowledge base articles added through the Employee Portal are text (.TXT) files; HTML articles can be added only through Maximizer.



Delete Articles

➤ To delete a knowledge base article

1. In the **Knowledge Base** page, select the **article**.
2. Click the **Edit** button and choose **Delete Selected Entry**.



Access Company Information

Employee Portal provides quick access to company information as follows:

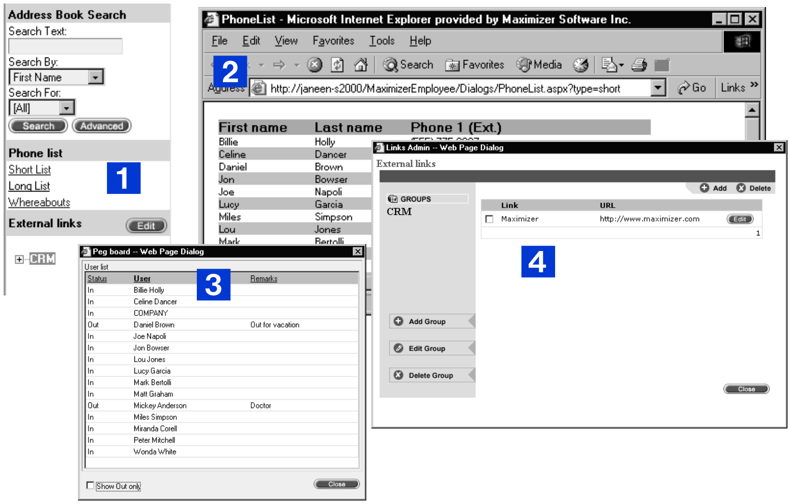
- **Phone List** – The short phone list includes all employees' first and last name, and phone numbers. Email addresses are included in the long type of list. This information cannot be modified in Employee Portal.
- **Whereabouts** – This section indicates who is out of the office. Using the Whereabouts is exactly like using Maximizer's Peg Board.
- **External Links** – These links provide employees with quick access to important websites.

➤ To use the company information section

1. Company information is accessed from the lower-left portion of the Employee Portal page.
2. Click the **Short List** or **Long List** links to open a phone list for employees.
3. Click the **Whereabouts** link to see if an employee is in the office.

You must be part of the Employee Administrator's security group (Employee Portal Administrator Users) to modify the external website links.

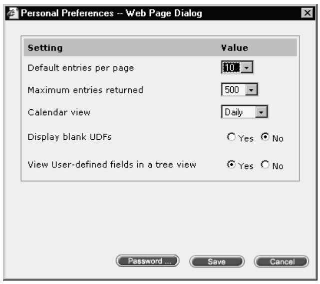
4 Click the **Edit** button to add, modify or delete external URLs. Use the **Add Group**, **Edit Group**, and **Delete Groups** links to modify the groups displayed in the main Employee Portal page.



Set Your Employee Portal Preferences

Employee Portal preferences are not global; they apply only to the Address Book you have open. Click the Personalize link at the top of Employee Portal to change the following Employee Portal preferences:

- **Calendar Settings** – Controls the default calendar view.
- **Maximum Entries** – Controls the number of entries displayed during searches and the default number of entries displayed per page.
- **UDFs** - Controls if employees can view user-defined fields that are in the Address Book, but do not yet have assigned values. A separate setting controls if user-defined fields are displayed in a tree-view or list-view.



Key Indicators

To access Key Indicators through Employee Portal, your system administrator must add you to the Key Indicators security group in Administrator.

Designed for executives and upper management, Key Indicators shows up-to-the-second indicators of your company's performance. Key Indicators can be accessed on the road through Employee Portal.

Like a car's dashboard, Key Indicators' instruments monitor daily activities and events in real time, so you can see at a glance which areas are doing well and which areas need attention. Information such as how many visitors are currently on your website, how many opportunities are in the pipeline, and your daily revenue from online purchases may be accessed instantaneously.

Some of the indicators you can choose from include:

- Daily Address Book Entries Added
- Value of Opportunities in Progress
- Daily Web Sales
- Daily Web Orders
- Pipeline Reports
- Lost and Suspended Opportunities

With this type of information on your screen at all times, you can see in a glance how your company is doing and even see the indicators register activity from moment to moment.

For important indicators, such as daily lost or won opportunities, you can configure Key Indicators to notify you with an alarm when the indicator passes a certain mark. This helps to notify you when a critical situation has occurred that requires your attention, or when you surpass a goal that you set for your team.

➤ To open Key Indicators

- In Employee Portal, click on the **Key Indicators icon**. Note that you can access Key Indicators only if your system administrator has added you to the Key Indicators security group.

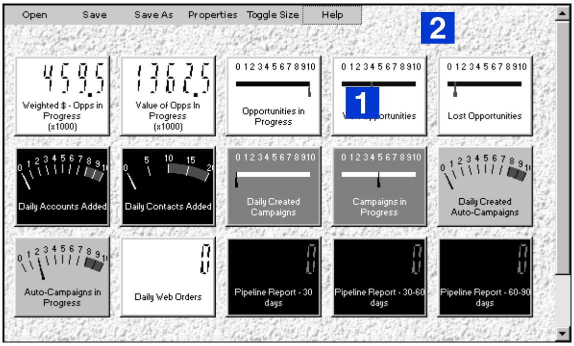
Main Window

To get help while using Key Indicators, select Contents from the Help menu or click the Help button in any dialog box.

The Key Indicators window is an array of customizable instruments. You can choose the indicators you want, as well as the instrument type—digital, linear gauge, or angular gauge. Key Indicators also lets you set the colors and backgrounds individually or globally.

➤ To adjust the indicator view

1. Click an **indicator** to customize it. Choose the indicator type, colors, and alarm settings.
2. Right-click **anywhere inside the window** to add or remove indicators or change the background properties.



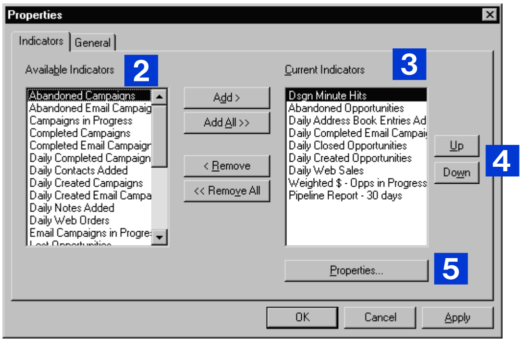
Choose the Indicators You Need

What do you need to know on a minute-to-minute basis? Do you want a single gauge of your daily web sales, or a dashboard with as much information as the space shuttle's control panel? Key Indicators can show you as many—or as few—indicators as you need to see.

➤ To choose indicators

1. Use the Properties dialog box to **add** or **remove** indicators.
2. The **available indicators** list shows you all the indicators you can add to your Key Indicators window.
3. The **current indicators** list shows you the indicators you have already added to your Key Indicators window.
4. Use the **Up** and **Down** buttons to change the order of your indicators in the Key Indicators window.

5. Click the **Properties** button to customize the selected indicator.



You can add and remove indicators using the Properties dialog box.

Set Alarm Levels

An indicator alarm is useful if you need to be notified when one of your indicators passes a certain level. If the number of lost opportunities gets too high, for example, you would probably want to be notified.

The alarm level serves two purposes. First, angular gauges display the "redline" at the alarm level. Second, the alarm level determines when the alarm is activated.

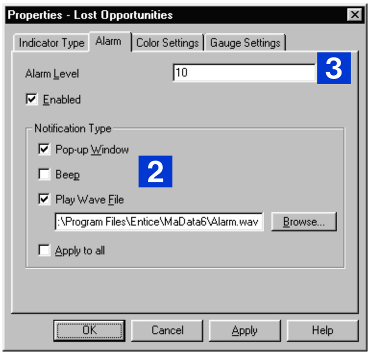
An alarm isn't necessarily like an alarm clock—you can be notified of an alarm with:

- a pop-up message
- a beep
- an audio file (Windows .WAV format)
- all of the above

➤ To set alarms and notification types

1. Use the **Alarm** tab to set the Alarm level and the notification type.
2. Choose how you want to be **notified**. If you have a sound file that you like, you can browse and select it.

3 Enter the **level** at which to trigger an alarm. This also sets the "redline" for gauges.



You can find some .WAV files in the "Maximizer\MaData6" folder.

For less important alarms, a simple beep may suffice. More critical indicator levels, however, could utilize the message, the beep, and an attention-getting sound file.

Personalize Your Indicators

Key Indicators has many options for customizing the appearance of your indicators and the Key Indicators window.

Select a Background Color

The Key Indicators window can show a background color of your choice or a tiled image. You can change either of these options in the Properties dialog box.

Customize Your Instruments

Indicators come in three instrument types: Angular Gauge, Linear Gauge, and Numeric LED (digital). For each indicator, you can choose one of these instrument types, change the colors, and set other gauge properties.

Change the Indicator Size

If your computer screen is short on real estate, you might want to set the indicators to a smaller size. Key Indicators can display in two sizes.

Set the Update Interval

By default, Key Indicators updates your indicators every few seconds, so you always have the latest information possible. You can change this setting to anything between 1 and 60 seconds between updates.

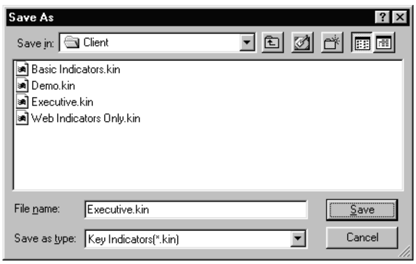
Because Key Indicators is a web-based technology, you may not want to update information as frequently as every second—this may cause unnecessary traffic for your Internet connection and for the Key Indicators web server (Microsoft IIS).

Save and Load Your Instrumentation

The instruments that you set up in Key Indicators can be saved and opened in the same way that you save and open documents in a word processor. Using .KIN files, you can create and save many different sets of instrumentation and load any .KIN file you want. You can exchange these Key Indicators files with other Key Indicators users—via email, floppy disk, or your company's network—so you can use their Key Indicators layout.

➤ To save your Key Indicator settings

- When saving, type a descriptive filename and click Save.



A .KIN file records not only the selection of indicators, but also their properties and layout. When you save your instrumentation to a .KIN file, you also save the colors, instrument type, and background.

Partner Portal

Maximizer users can access the sample Escona Address Book using “Paul” as the user ID and “password” as the password.

Partner Portal is a web application that creates a two-way flow of information between your organization and its business partners. Organizations with an extended sales force of resellers or dealers need a way to distribute and monitor sales opportunities to these partners. Partner Portal allows business partners to view sales opportunities via the web, and to update them as needed.

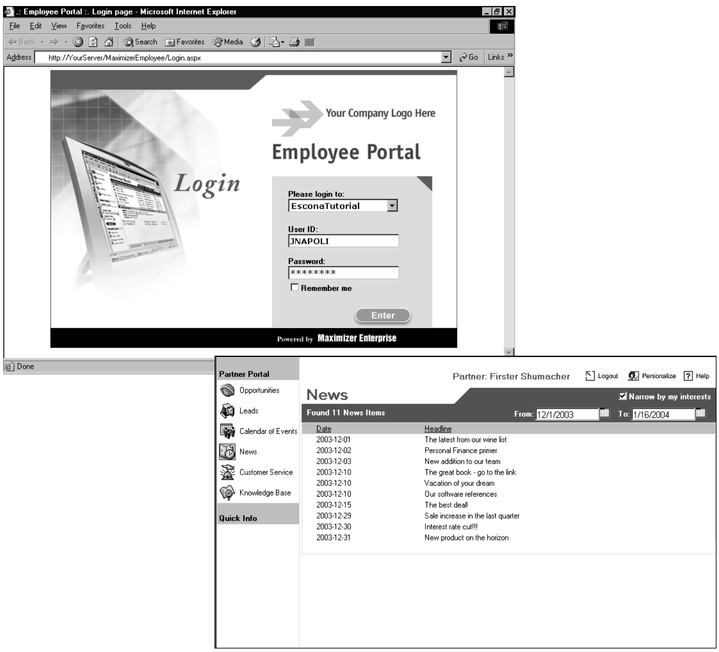
Staff can publish news to the portal. News items can be filtered for partners based on their interest areas.

Customer service cases may be associated with a Contact of a Company or an Individual. Partners (the Contact associated with the case) can then follow the progress of the case. The knowledge base may also be searched for related articles.

Partners access Partner Portal using the URL and setup PIN emailed by the portal administrator. See the Administrator’s Guide for more information about setting up Partner Portal.

Opportunities are assigned to partners by selecting a partner on the Partner tab of the opportunity. Leads are assigned by assigning the partner to the lead on the Basic Information tab of the Address Book entry. Each time a partner is assigned an opportunity or a lead, the partner is notified by email.

Partners may view and update opportunities that have been assigned to them via Maximizer. Assigned leads are also available to partners.



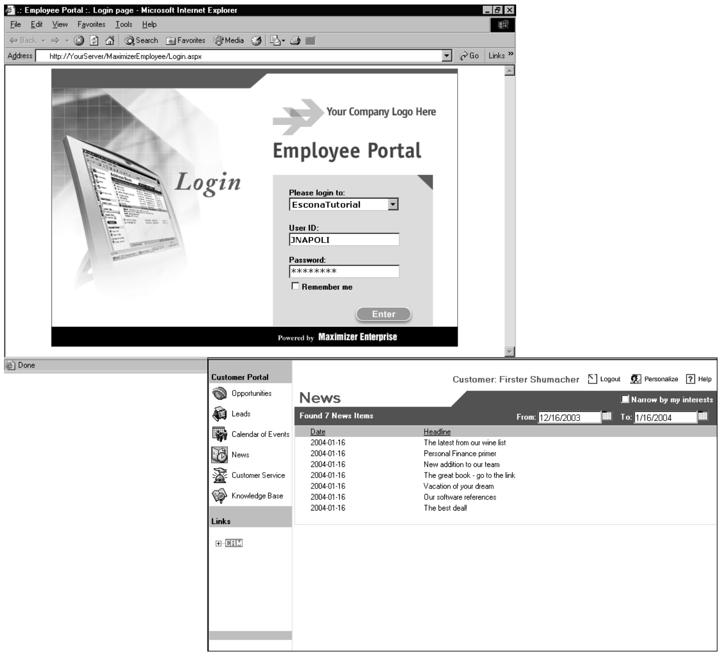
Customer Portal

Maximizer users can access the sample Escona Address Book using "Mary" as the user ID and "password" as the password.

Customer Portal offers customers a number of web-based services. The portal's functionality is very similar to Partner Portal in that Customer Portal can be customized to display information essential to your customers. Staff can publish to the portal news such as new products or services; news items can be filtered for customers based on their interest areas; and a discussion area enables customers to provide feedback or request desired products or services.

Customers may follow the progress of their customer service cases. The knowledge base may also be searched for related articles.

As with Partner Portal, customers access Customer Portal using the URL and setup PIN emailed by the portal administrator; they then set up their own login information. See the Administrator's Guide for more information about setting up Customer Portal.



Wireless Employee Portal

Wireless Employee Portal provides wireless access to Maximizer and is optimized for use on Neomar browsers for RIM pagers and hand-held devices for the Palm OS. Check with either Maximizer Software Inc. or your Business Partner for compatibility before deployment.

The following website lets you apply for free membership in the Neomar developer program to learn about the browser and download an emulator for development:

`www.neomar.com/developers/index.html`

➤ To access Wireless Employee Portal

1. Publish the **Wireless Portal**. See the Administrator's Guide for more information.

2. To access Wireless Employee Portal, select **Wireless Employee Portal** from **Start > Programs > Maximizer Enterprise > Portals**. You then enter the **URL** in the dialog box (see below into your handheld device. This URL is also shown in the File > Portals > Shortcuts tab in Administrator.

2

CHAPTER 10

Maintaining Your Address Book

Maintain Your Address Book

In this chapter...

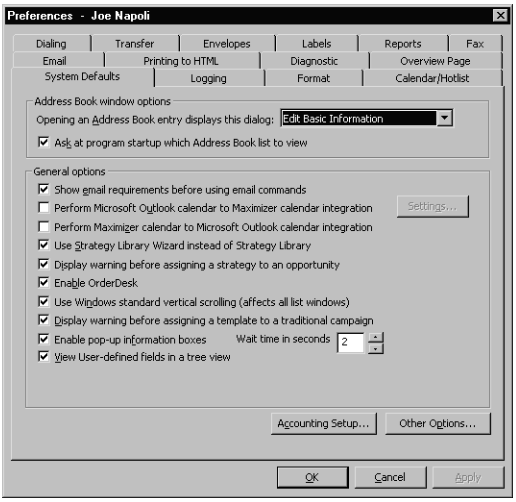
Set Your Maximizer Preferences

The Preferences dialog box in Maximizer is where you can personalize how Maximizer works for you. This dialog box has various settings that provide a great deal of flexibility in how you work—in other words, Maximizer adapts to the way you want to work.

For detailed information, select the tab you are interested in and press F1 for a description of each item.

➤ To set your Maximizer preferences

1. Select File > Preferences. Click the tab that corresponds to the area of Maximizer you want to configure. Each tab represents a different area of the program.
2. The options you can set include the following:
   - **System defaults** such as Outlook calendar integration options
   - **Date**, **time**, and **mailing address formats**
   - **Calendar** and **Hotlist preferences**, including the sending of emails to appointment attendees
   - **Email options**, such as to use text or HTML when composing messages
   - **Viewing preferences** for My Work Day (Overview Page)
   - **Dialing options** for phones and modems
   - **Transfer options**
   - **Printing options** for envelopes, labels, and reports
   - **Faxing options** (DDE settings for your fax software)



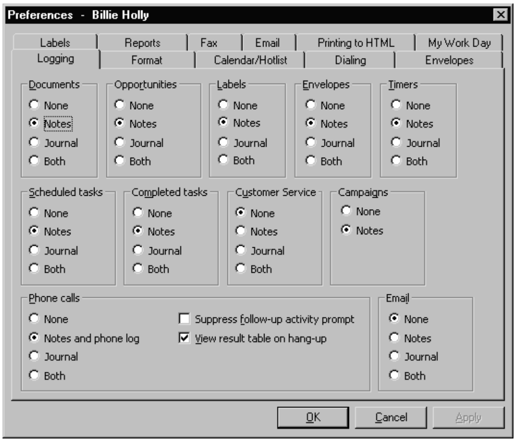
For detailed information, select the tab you are interested in and press F1 for a description of each item.

User preferences override the general Address Book preferences (File > Preferences).

➤ To set your user preferences

1. Select **File > Users > [your user ID] > Properties**, and click the Security tab. These access rights are set up in Administrator. Although you cannot change these settings, it's useful to know your access rights.
2. The options you can set include the following:
   - **Logging** for common actions and activities
   - Date, time, and **mailing address formats**
   - **Calendar** and **Hotlist** preferences, including the sending of emails to appointment attendees
   - **Dialing** options for phones and modems
   - **Page layout** options for printing envelopes, labels, and reports
   - **Faxing** options and read-only preferences for page margins
   - **Email** options, such as to use text or HTML when composing messages
   - **HTML printing** options
   - Viewing preferences for **My Work Day**
3. To change your password, choose **Users** from the File menu, select your **user ID**, and click **Password**. Enter your password and enter it again to confirm the change.

   If you are running Maximizer on a SQL database, and have several Address Books on the SQL server, each of your passwords must be identical. When you change one password, Maximizer will prompt you; select "Yes" to change the other passwords.



Back Up Your Address Book Data

The procedures vary for those running a SQL database vs. a Pervasive database. Follow the corresponding instructions.

SQL Backup Procedure

For detailed instructions on backing up a SQL Address Book, see the Administrator’s Guide or your Microsoft SQL Server documentation.

Pervasive Backup Procedure

? The information provided here is intended as a “quick reference”. For full instruction on backing up a SQL database, open the Microsoft SQL Server Enterprise Manager online Help and look up “backing up” in the index.

Back up your Address Book on a regular basis. If a problem occurs and you have to restore your data, you will have to re-enter all of the information since that backup. While one backup copy is often enough, you may want to keep two or three copies on a rotating basis. You can store your backup files on a network or on removable media such as a backup tape. You should always have one backup off-site.

In Maximizer you can perform only a Quick Backup, however, in Administrator there are two types of backup procedures available:

- **Regular Backup** enables you to choose the types of files to back up. This backup procedure requires the Address Book to be closed.
- **Quick Backup** backs up the entire Address Book. You can perform a Quick Backup without closing the Address Book.

Quick Backup

You must have access to the Master user’s password to perform a Quick Backup.

The Quick Backup feature enables you to perform a fast backup of any open Address Book. Quick Backup automatically backs up all entry types, rather than asking you to specify which entry types to back up. The advantage to using Quick Backup is that you can perform frequent backups without closing the Address Book.

Backing Up to the Current Address Book

If you choose to save the backup to the current Address Book folder, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files. Each backup is saved within Backup using the current date as the folder name.

As an example, if you perform a Quick Backup on March 23, 2004 the backup files would save to the following folder:

C:\MaxData\AddrBks\<AddressBook>\Backup\20040323.01\

The ".01" is added to the folder name to differentiate between backups from the same day, so a second backup on the same day would be saved to the following folder:

C:\MaxData\AddrBks\<AddressBook>\Backup\20040323.02\

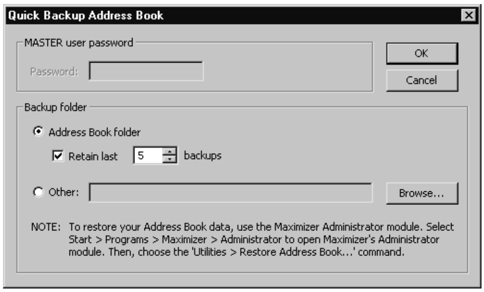
In this way, you can save many backups and have them dated for easy retrieval. Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

Backing Up to a Specified Location

If you do not want to save the backup files in the Address Book folder as described above, you can specify a folder when you start Quick Backup.

➤ To perform a Quick Backup

1. Open the **Address Book** to back up.
2. Select **File** > **Quick Backup**.



3. Enter the MASTER user's password.

   If this box is disabled, continue to the next step.

4. Select the backup folder:

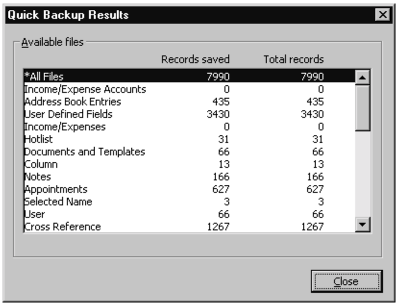
   Address Book folder saves the backup files to the same location as the Address Book folder.

   Other enables you to save the backup files to a location other than the Address Book folder.

5. If you selected Address Book folder, specify the number of previous backups to retain.

6 Click **OK** to begin backing up.

Depending on the size of the Address Book folder, the backup could take several minutes or several hours. When the Quick Backup is complete, a summary of the backup appears.



7 Click **Close** to exit the dialog box.

Purging Outdated Notes and Documents

After a long period of activity, you may want to delete outdated notes and documents using Maximizer's purge feature.

You can also give users the ability to purge old notes and documents in Maximizer.

- To be able to purge notes (File > Purge > Notes), the user must have the Delete checkbox selected beside Notes in the Security tab of the User Properties dialog box.
- To be able to purge documents (File > Purge > Documents), the user must have the Delete checkbox selected beside Documents in the Security tab of the User Properties dialog box.

When you purge notes, you must specify the note types to delete:

- **Manual** — added manually to the Notes and Customer Service windows.
- **Mail-outs** — created when users print labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Mail-out notes are also created when users send an email to more than one Address Book entry.
- **Tasks** — created when appointments or Hotlist tasks are scheduled or completed.
- **History** — created in the Opportunities/Customer Service window when opportunities or cases are added or changed. History notes can be printed or searched only from these windows.

- **Email** — created in Maximizer's Address Book window when an automated campaign is launched.
- **Other** — third-party or custom notes.
- **Phone calls** — created when you dial a phone number, or log a received call.
- **Timed notes** — created when the Timer is used while writing a note.
- **Transfer log** — notes logged when Address Book entries are transferred between Address Books.
- **Opportunity** — created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
- **Customer Service** — notes created in the Address Book window when you add a case.

The purge command deletes all notes, with the exception of other user's private notes (unless the user purging the notes has rights to delete other users' notes), in the specified date range for all Address Book entries in the open Address Book. You should back up the Address Book before purging notes.

➤ To purge notes

1. In Maximizer, open the Address Book you want to clean up.
2. Select **File** > **Purge** > **Notes**.
3. Specify a date range.

   Maximizer deletes notes dated between the specified dates.
4. Select the type(s) of notes to delete, and click **OK**.

➤ To purge documents

1. In Maximizer, open the Address Book you want to clean up.
2. Select **File** > **Purge** > **Documents**.
3. Specify a date range.

   Maximizer deletes documents dated between the specified dates.
4. If you want to purge private documents belonging to other users, select the **Delete other users' private documents** option.
5. Click **OK**.

Import Address Book Entries or Knowledge Base Articles

You can use Maximizer to import Contacts from other sources, such as ACT!, GoldMine, or Outlook. You can also import Knowledge Base articles in XML format.

After importing data into Maximizer, you can access the imported data by selecting View > Favorite Lists in Maximizer. The imported data is stored in a favorite list named with the file format and import date and time.

Import Methods

? For information on exporting data from Maximizer, refer to Maximizer online help.

Maximizer provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **Address Book Entries** – This method imports entries from a text file that is created when you export from another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts. For more information, refer to "Two-Tier Import" on page 196.
- **Advanced Import** – This method enables you to import Address Book entries or Knowledge Base articles in XML or MXI (Maximizer XML data file) format. For more information, refer to "Advanced Import" on page 199.
- **ACT! or GoldMine Database** – Importing an ACT! or GoldMine database is straightforward as Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. For detailed field mapping information, refer to "Import from ACT! or GoldMine" on page 200.
- **Other Contact Manager Database** – This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. For more information, refer to "Import from another Contact Manager Database" on page 202.

Use the following table to determine which import method to use.

File Type	Import Method(s) (File > Import > ...)
XML (*.mxi, *.xml)	Advanced Import
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)	ACT! Database
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf)	GoldMine Database
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer ’87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

Two-Tier Import

If you import a Company record, and an existing Company record in the database has an identical "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

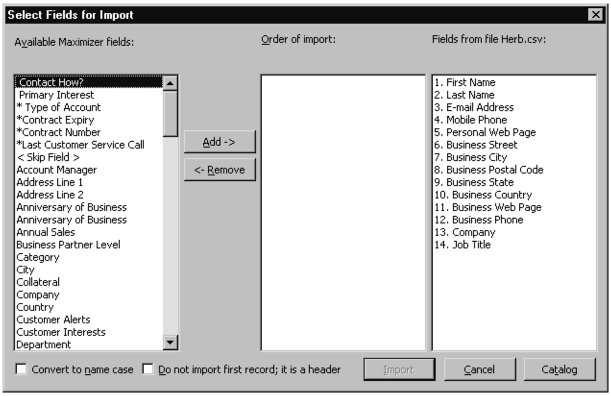
Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

Field Mapping

When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

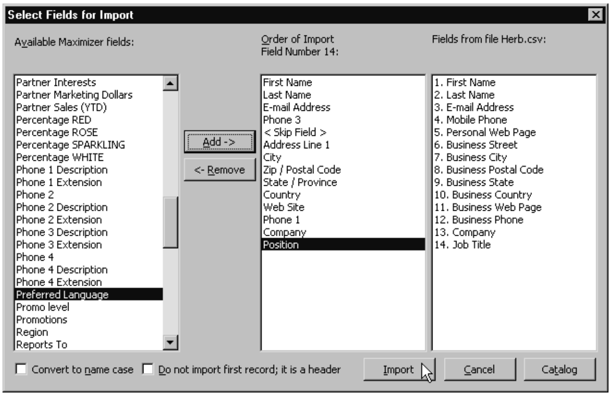
When importing some types of data files, you need to map—create an association between—the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Outlook and "Company or Individual" in Maximizer.

When you are importing a file type that requires you to map fields, a dialog box similar to the following opens.



For each field in the source file (shown in the far right column), select one of the available Maximizer fields and, click **Add** to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select **<Skip Field>** from the list of Maximizer fields. When you have finished mapping

the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column, as illustrated below.



➤ To import Address Book entries (two-tier import)

ⓘ Always back up the Address Book before importing.

ⓘ User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

1. From the **File** menu, select **Import** > **Address Book Entries**.

   The Import Address Book Entries dialog box opens.

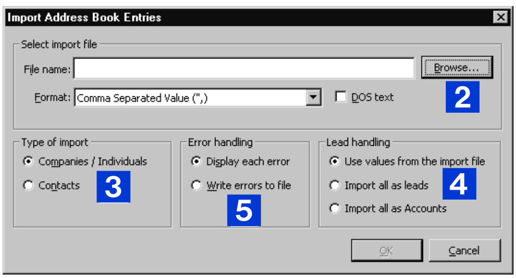
2. Click **Browse** and locate the file to import.

3. Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

   (After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

4. In the **Lead handling** box, select the appropriate option for importing records as lead or non-lead Address Book entries.

5. Click **OK**.



   The Select Fields for Import dialog box opens.

6 In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

ⓘ To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

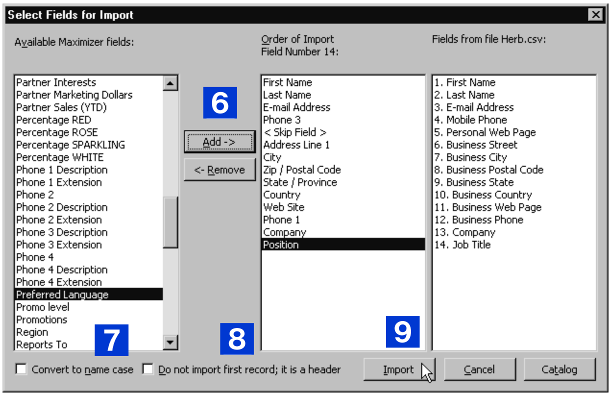
The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

7 To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.

8 Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

ⓘ You can save the field mapping for reuse by clicking the Catalog button.

9 Click **Import**.



The data from the source file now imports into Maximizer.

10 Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

Advanced Import

The Advanced Import feature enables you to import Address Book entries and Knowledge Base articles in MXI (Maximizer XML Interface) or XML (Extensible Markup Language) format.

ⓘ For more information on using XML for importing data, and the Maximizer XML Schema, refer to the Administrator's Guide.

➤ To Import Address Book Entries in XML or MXI format (Advanced Import)

1. From the **File** menu, select **Import** > **Advanced Import**.

   The Advanced Import dialog box opens.

2. Click **Browse** and locate the .xml or .mxi file to import.

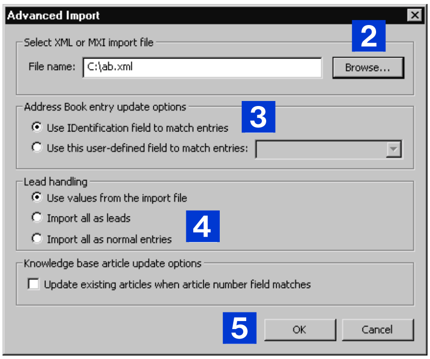
3. Select one of the Address Book entry update options:

   Use IDentification field to match entries uses Address Book identification values as the criterion for matching records.

   Use this user-defined field to match entries provides a drop-down list of fields from which you can select the criterion for matching records.

4. In the **Lead handling** box, select the appropriate option for importing records as lead or non-lead Address Book entries.

5. Click **OK** to begin the import.



➤ To Import Knowledge Base articles (Advanced Import)

ⓘ Always back up the Address Book before importing.

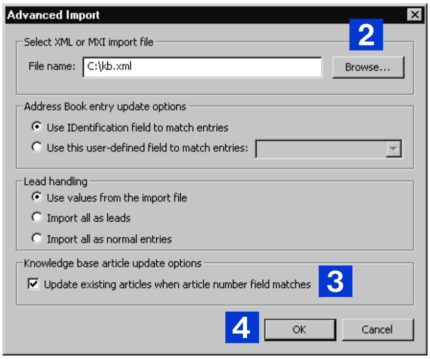
1. From the **File** menu, select **Import** > **Advanced Import**.

   The Advanced Import dialog box opens.

2. Click **Browse** and locate the .xml or .mxi file to import.

3. If you would like to update existing Knowledge Base articles with imported articles, when the article number field matches, select the **Update existing articles when article number field matches** option.

4. Click **OK** to begin the import.



Import from ACT! or GoldMine

For detailed information about field mapping between Maximizer and ACT! and GoldMine, refer to "Importing Data" on page 176.

➤ To Import ACT! or GoldMine Contacts

ⓘ Always back up the Address Book before importing.

ⓘ When importing GoldMine Contacts, GoldMine must be installed on the same machine as Maximizer; the Borland database engine is required during the import.

1. From the **File** menu, select **Import** > **ACT! Database**.

   – or –

   Select **Import** > **GoldMine Database**.

   The Import Databases dialog box opens. The file type is selected for you automatically.

2. Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the folder.

3 In the Import Options group box, select the **Log Errors to File** option if you want to log any errors that occur during the import process to a text file.

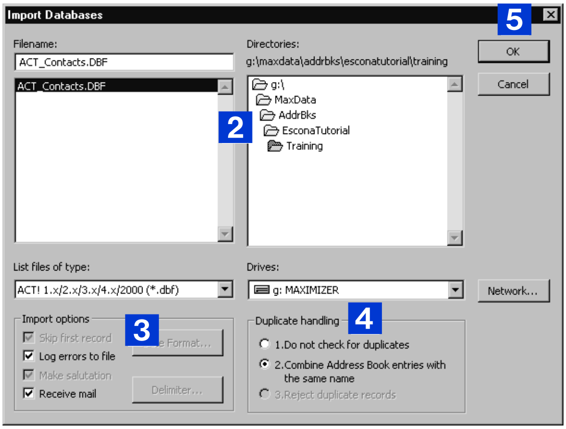
All other options in the Import Options group are handled automatically by Maximizer.

4 Specify how you want duplicate records handled, and click **OK**.

If duplicate records are found in the data, the option you select here determines whether or not duplicate records are combined. They will be added to the Address Book.

Maximizer requires that each Address Book entry be assigned a unique Address Book entry ID. If the import record contains an Address Book entry ID that is the same as an existing Maximizer Address Book entry or Contact, the Address Book entry ID of the imported entry is automatically changed when that entry is added to Maximizer and this action is recorded in the import error message file.

5 Click **OK** to begin the Import process.



During the import process a status indicator appears on the screen. Click **Cancel** if you want to halt the import process.

The Errorlog.txt file appears in the same folder as the import file. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

6 Once the data is imported, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, or merged, and the number of records with associated import warnings. Click **OK** to close the message box.

Import from another Contact Manager Database

ⓘ Always back up the Address Book before importing.

➤ To Import Contacts from another type of contact management database

1. From the File menu, select **Import** > **Other Contact Manager Database**.

   The Import Databases dialog box opens.

2. From the **List files of type** drop-down list, select the file format of the database you are importing.

3. Locate the file you are importing. If the file is a network file, click the **Network** button or use the **Drives** field drop-down list to access the network drive.

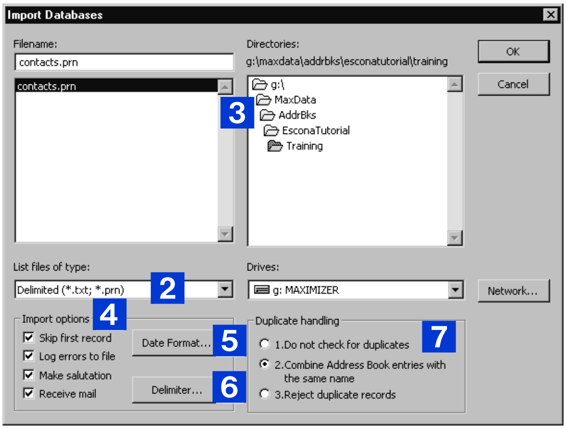
4. In the Import Options box, select the options you want to include. Depending on what type of database you are importing, some of these options may not be available.

5. If you are importing a character delimited text file, you must specify a Date Format. To do so, click the **Date Format** button, select the date format used in the source file, and click **OK**.

6. If you are importing a .txt or .prn file, you must also specify the character used as the field delimiter in the import file.

   Click the **Delimiter** button, select the delimiter type, and click **OK**.

7. In the **Duplicate handling** group, select one of the options to specify what Maximizer should do when it encounters duplicate Address Book entries, and click **OK**.



The Select Fields for Import dialog box opens.

8 In the **Contact fields** or **Address Book entries fields** lists, select the field that best corresponds to the first field in the **Fields from file <filename>** column, and click **Add**. Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

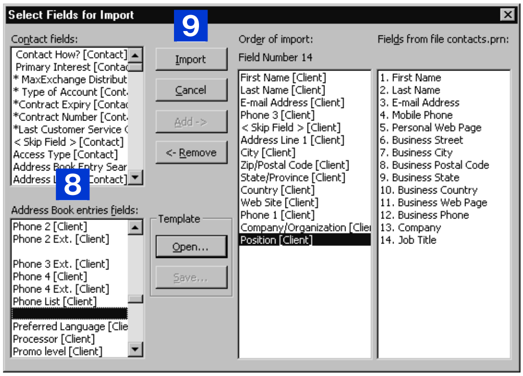
To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Contact fields or Address Book entries fields list.

Use **Contact fields** to create Contacts for Companies or Individuals.

Use **Address Book entries fields** to create Company or Individual Address Book entries.

9 Click **Import** to begin the import process.



Once Maximizer imports the data from the import file, the Conversion Completed or Import Completed message box displays the number of fields read, imported, skipped, failed, merged and the number of records with associated import warnings.

The Error Log appears next displaying the location of the import error message file. If you want to view this file, make a note of where it is located. Unless the import utility reports that all records were imported successfully, carefully review the ERRORLOG.TXT file to identify and resolve import problems.

Transferring Entries between Address Books

Encrypted user-defined fields cannot be transferred or exported to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

What Happens During a Transfer?

You should never use Maximizer Email Transfer (MET) between two MaxExchange-synchronized computers. Using MET and MaxExchange in combination adds records twice on the destination computer—once through MET, and again through MaxExchange.

Note that each Address Book entry has a unique ID.

Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs** — If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.
- **Address Book entry names** — If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

  If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

  If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.
- **Date and Time** — Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

Transfer Address Book Entries

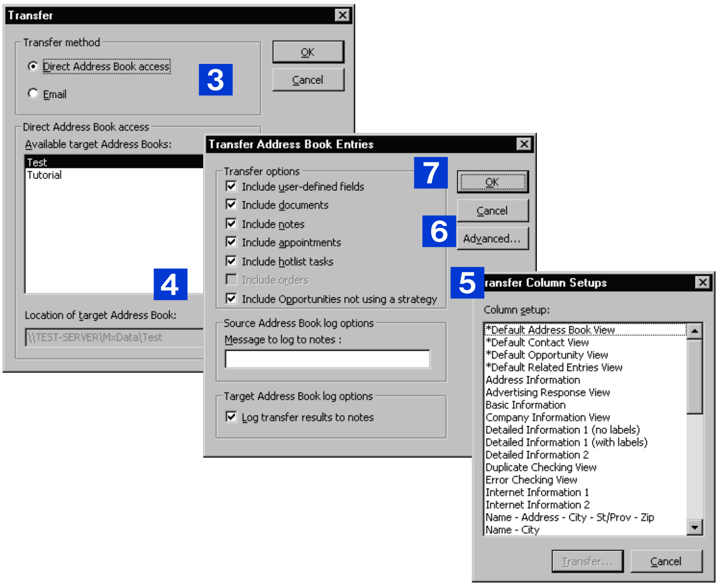
For more information about transferring other information such as column setups, see the online help.

By default, when you transfer Companies or Individuals, the following are included—all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders (not available for SQL), and opportunities. Encrypted user-defined fields and customer service cases cannot be transferred.

To see if you have transfer and export rights, go to File > Users (select your user ID) > Properties > Security.

➤ To transfer Address Book entries

1. In the Address Book window, select the **entries** you want to transfer.
2. Select **File > Transfer > Address Book** entries.
3. Select **Direct Address Book Access** or **Email** as the transfer method.
4. Select the **target Address Book**, and click OK. A login dialog box appears. Type your **user ID** and **password** to log in to the target Address Book, and click **OK**. The Transfer Address Book Entries dialog box appears.
5. Under Transfer options, select the **entry types** to include in the transfer. If you are transferring data other than Address Book entries, such as column setups, choose the items you wish to transfer. In this example, the available column setups are listed.
6. If you want to **log** a message to notes, enter one in the text box. If you want to set the advanced options, click the **Advanced** button.
7. Click **OK** to or **Transfer** to begin. When Maximizer finishes, the Transfer Summary displays the results of the transfer. If you chose to email the data, Maximizer prepares the transfer file (with an .MET extension) as an email file attachment and displays the Compose Mail Message dialog box.



Transfer Summary Reports and Logging

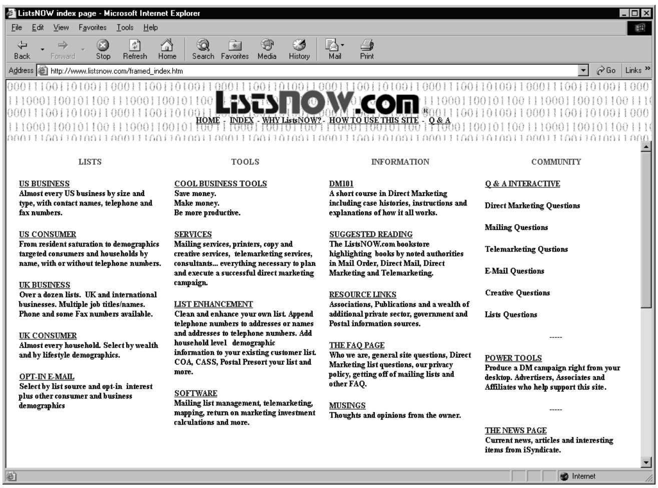
Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can, optionally, add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

What is ListsNOW.com?

ListsNOW.com is an Internet list-brokering service that provides you with access to over 200 million households in the US and UK. ListsNOW.com allows you to search and download targeted and qualified marketing lists based on criteria you select. The lists can be downloaded to your computer and then imported directly into Maximizer as Address Book entries. You can then use the data for your marketing campaigns or sales prospecting activities.

By personally selecting the criteria for your target markets, ListsNOW.com allows you to cost-effectively narrow your list of targeted consumers to those most likely to be interested in your product or service. The listings are comprehensive, up-to-date, and versatile.



ListsNOW.com

From the ListsNOW.com home page, click Enter to see the main menu page. Peruse the information under the Tools, Information, and Community headings. Click the "How to Use This Site" link for assistance with using ListsNOW.com.

Under the Lists heading, available lists are broken down into the following categories:

- US Business — almost every US business by size and type, with contact names, telephone and fax numbers. Links to Centrus Online, AccuLeads, and Experian List Online.
- US Consumer — from resident saturation to targeted consumers and households by name, with or without telephone numbers. Links to Centrus Online, zapdata.com, AccuLeads, and Experian List Online.
- UK Business — over a dozen lists of UK and international businesses. Multiple job titles/names. Phone and some fax numbers available.
- UK Consumer — almost every household in the UK. Select by wealth and by lifestyle demographics.
- Opt-in Email — select by list source and opt-in interest plus other consumer and business demographics. Link to Postmaster Direct Response.

After selecting a category, follow the ListsNOW.com or vendor instructions to narrow down your list to a business profile—sales volume, number of employees, office type, and other criteria. Once you have specified the criteria for the list, you choose how many records to purchase and in what format you wish to receive them.

Import a List into Maximizer

After downloading the data file, Maximizer's Administrator module allows you to import lists you acquire from ListsNOW.com and other sources, including Acxiom ListConnect, MyProspects, and ThinkDirectMail.

With the list database file on your computer or diskette, import the data file using File > Import Other Contact Manager Database For more information, see "Import from another Contact Manager Database" on page 202.

CHAPTER 11

Reporting and Graphing

Report and Make Graphs on the Progress of Your Business

In this chapter...

What is Reporter?

? You can get online Help while using Reporter. From Reporter's Help menu, select Contents.

The success of any marketing strategy or campaign depends on the ability to monitor your progress and some sort of a built-in improvement mechanism. Using the vast flexibility of Reporter, you are guaranteed increasing effectiveness. No matter where you are in the world, you have access to what's going on in your company and the ability to report on real-time statistics.

Generate Your Reports Anywhere

Reporter is available if you are running Maximizer on a SQL database. Check with your system administrator.

Reporter's flexibility allows you to generate reports from any Internet-connected computer. When you open Reporter in Maximizer, your list of reports is displayed inside the browser window. This is the normal mode of using Reporter and requires no additional setup by your system administrator.

Because Reporter is HTML-based, you can access your reports from anywhere in the world, provided you have met the following conditions:

- Your computer has an Internet connection and a web browser.
- Your system administrator has configured Microsoft Internet Information Server to allow external access to Reporter.

Your list of reports appears in a web browser much as it does within the Reporter module.

Print, Save, and Edit Your Reports

After generating a report, you can easily print the report to your local or network printer. You can also save your reports to a file in one of a few popular formats for later editing. These file formats include Crystal Reports, Microsoft Word, Microsoft Excel, and Rich Text Format.

➤ To open Reporter

- Select **Start > Programs > Maximizer Enterprise > Reporter**. At the login screen, select the appropriate Address Book, enter your **user ID** and **password**, and click **Login**. After a moment, Reporter opens.

Generate Reports

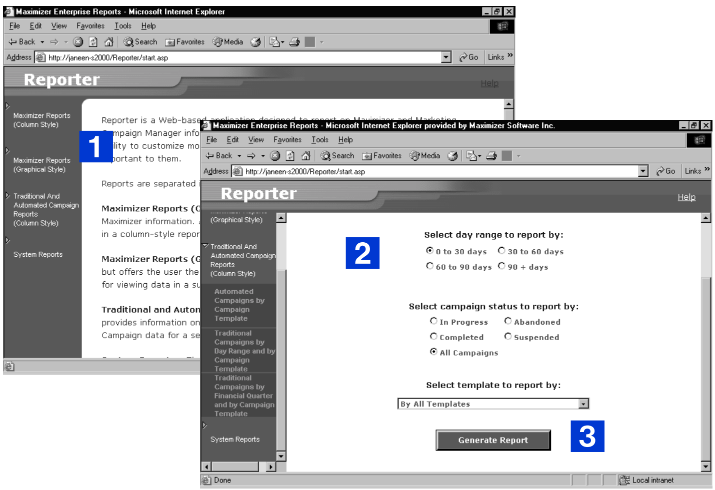
? For a more detailed description of the report types available in Reporter, open the Reporter online Help and look up "Report Types" in the index.

Reporter's browser-based window allows you to easily select and print the report you want. The navigation bar organizes the many pre-formatted reports by subject. Reports on your Address Book entries and opportunities are listed under "Maximizer Reports (Column Style or Graphical Style)". Similarly, you can obtain reports on your marketing activities under Traditional and Automated Campaign Reports. In addition to column style reports, Reporter can print graphs on your opportunity and campaign information.

"System Reports" includes sales and marketing team reports and a report on "Key Indicators"—an aggregate snapshot of your opportunities.

➤ To generate reports in Reporter

1. Click a **report heading** to see the reports that are available. The system reports relate specifically to system administration.
2. For each report you generate, specify the **report options**. Some reports require you to choose a financial quarter and a year, others—such as team reports—ask for opportunity status, team leader, or perhaps a date range.
3. Click the **Generate Report** button once you've specified your options.



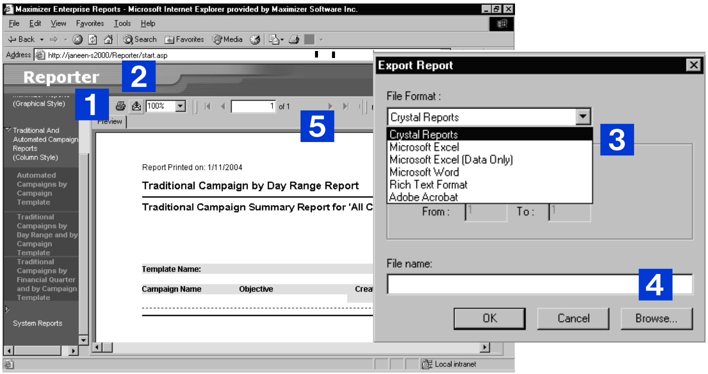
With the selection of pre-formatted reports available in Reporter, you can produce a great many sales and marketing related reports and graphs.

Print and Export Reports

ⓘ You can integrate custom Crystal Reports with the Reporter module. See the Administrator's Guide for more information.

➤ To print or export the report

1. Click the **Print Report** button to print the report.
2. Click the **Export Report** button to export the report.
3. You can export your report in one of several formats. Choose the desired format if you are exporting the report.
4. You can also update an existing report by clicking the **Browse** button and choosing an existing report.
5. In the generated report, you can use this toolbar to navigate between pages in the report and perform other actions.



Access Reporter Through a Web Browser

ⓘ Contact your system administrator to find out the URL (the address) of Reporter.

If you have access to Employee Portal, click the Reporter link at the top of the Company Info page.

Reporter is designed so you can generate reports on your data via the Internet or your company's intranet. You only need a computer with an Internet (or intranet) connection and a web browser, such as Internet Explorer or Netscape Navigator.

In the case of Internet access, your system administrator must configure your Microsoft Internet Information Server (IIS) to allow external access to the "Reporter" virtual directory; otherwise, Reporter is only accessible internally (within your company's LAN).

Intranet Access

If you are on the same network (LAN) where your IIS server is located, you can open your browser and type the following into the Address field:

http://<Server Name>/Reporter/Start.asp

The "<Server Name>" is the computer name of the IIS server on your company's network. If you know the server's IP address, you can enter that in place of the server name.

Internet Access

Reporter is only accessible via the Internet if your system administrator has configured the IIS server to allow external access to Reporter. For security reasons, external access to Reporter may not be desirable. At an Internet-connected computer, type the following in your web browser's Address line:

http://<Server URL>/Reporter/Start.asp

The "<Server URL>" is the domain URL or IP address of your company's IIS server.

Crystal Reports Embedded Designer and Viewer

Maximizer includes the Crystal Reports 9 Embedded Designer and Viewer. The Crystal Reports Embedded Designer and Viewer is installed automatically with Maximizer and is accessible from the Reports menu. Maximizer installs a set of standard Sales and Customer Service reports, but you can also create your own custom, shared reports and save them in the Maximizer Reports folder where they can be accessed from the Reports menu.

Create and Access Corporate Reports

The Maximizer installation provides a standard report set consisting of Sales and Customer Service reports. These reports provide out-of-the-box reporting.

For Pervasive database users, only the Basic Pipeline and Case Assignments reports are available.

The Maximizer Enterprise Server installation creates the ...\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder, which contains shared reports. All folders and reports within this folder are accessible from the Reports > Crystal Reports menu in Maximizer.

➤ To create and access a corporate Crystal Report from Maximizer

ⓘ You can launch the Crystal Reports Designer through the Reports > Crystal Reports > Personal > Custom Reports menu item in Maximizer or through the Crystal Reports program menu if you have the full version installed.

1 Create a folder on the Maximizer server in the following location:

- Documentation and Settings\All UsersApplication Data\Maximizer\SvrShare\Reports\<Address Book name> folder\

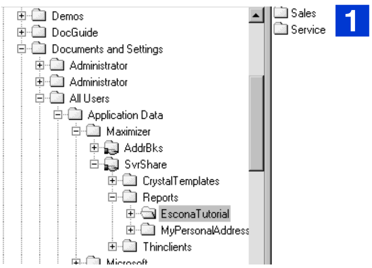
Alternatively, you can save it in one of the following folders that are created by the Maximizer installation:

- Documentation and Settings\All UsersApplication Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Sales
- Documentation and Settings\All UsersApplication Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Service

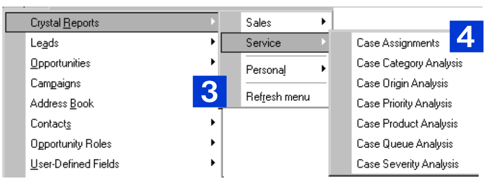
ⓘ If you create your own folder, it appears as one of the submenu items under the Crystal Reports item.

2 **Copy** or **save** the report file in your custom folder, or in the Sales or Service folder.

3 Select **Reports > Crystal Reports > Refresh menu**. If you created a folder, it is displayed as one of the available report types (submenu item) and your report is available in the folder where you saved the report.



4 To access a custom report, simply choose it from the **Reports > Crystal Reports** submenu. For example, choose the report from the Sales or Service submenu.



Create and Access Personal Reports

In order to launch Crystal Reports from the Crystal Reports > Personal > Custom Report menu, you must be part of the Crystal Report Users security group. See the Administrator's Guide for more information.

Maximizer Enterprise installations also create the local folder ...\My Documents\MaximizerReports. This local folder is the default location for a user's personal report templates.

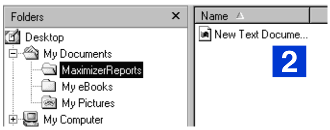
The File > Print > Custom Reports command enables the user to create new report templates, edit existing report templates, and to view reports using existing report templates. The Custom Reports command is also available from the Reports > Crystal Reports > Personal menu.

➤ To create and access a personal Crystal Report from Maximizer

1. Create a custom report by choosing **Create a new custom report template** from the Custom Report dialog box (Crystal Reports > Personal > Custom Report).

2. Create the report in Crystal Reports and **copy** or **save** the report file in the following folder on your local drive.

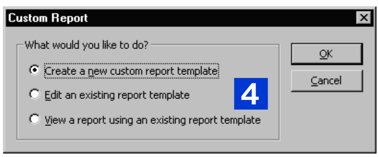
   - ...\My Documents\MaximizerReports



If you create your own folder, it appears as one of the submenu items under Crystal Reports > Personal.

3. Select **Reports > Crystal Reports > Refresh menu**.

4. To access a custom report, choose the report from **Crystal Reports > Personal**. Alternatively, you can select Personal > Custom Report from the Reports > Crystal Reports submenu and choose the **View a report using an existing report template** option in the Custom Report dialog box. If you'd like to edit the report template, choose **Edit an existing report template**.



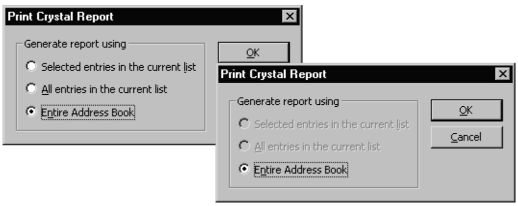
Data Population for the Current Window

When you create a new report template or edit an existing one using the Crystal Report Designer, in the Database Expert dialog box, use the Current Connections option with the available data source (MAS_[Address Book name] for SQL or MAP_[Address Book name] for Pervasive).

Following is a list of each controlling window and its associated default table and file names used for the Crystal Report Designer.

Controlling Window	SQL Table	Pervasive File
Address Book	AMGR_Client	AMGR_Client_Tbl
Opportunity	AMGR_Opportunity	AMGR_Opportunity _Tbl
Campaigns	AMGR_Opportunity	AMGR_Opportunity _Tbl
Hotlist	AMGR_Hotlist	AMGR_Hotlist_Tbl
Customer Service	AMGR_CSCases	AMGR_CSCases_Tbl

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



Print Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes, Name/Address/Telephone, and Overdue Cases by Queue reports, allow you to print specific information about your Address Book entries, opportunities, and customer service cases.

If you need to print more complex reports on your Address Book information, try using Reporter.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

You can print reports from the Reports or File > Print menus. The Reports menu gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you're in the Address Book window, and want to print an opportunity report, select Reports > Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The File > Print menu item prints reports strictly related to the window that's currently open.

The Reports menu allows you to print reports on the following Maximizer information:

- Opportunities
- Address Book entries
- Contacts
- User-defined fields
- Notes
- Customer service cases
- Documents
- Hotlist
- Calendar
- Knowledge base articles
- OrderDesk
- Journal entries
- Expenses
- Related entries
- Address Book opportunities (opportunities as displayed in the Opportunities following window)
- Activities
- Phone log

The Opportunities Executive Report generates many HTML files for its web browser interface. Save this report to a separate folder to keep your files organized.

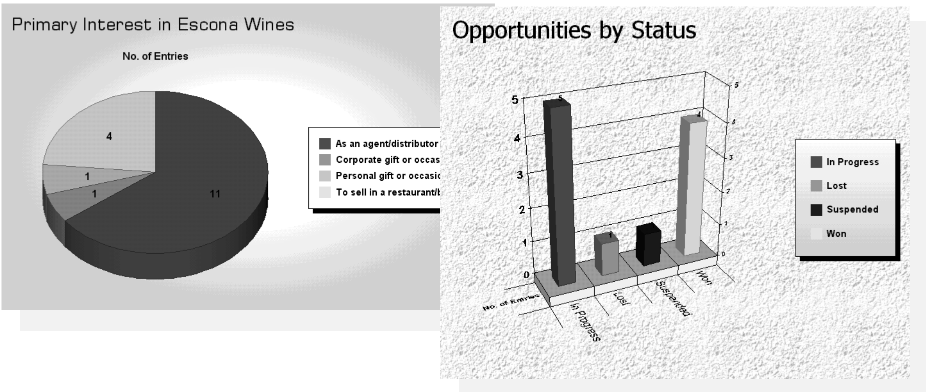
Following is a summary of some of Maximizer's "special" reports:

- **Executive Report** – generates a highly detailed interactive HTML-based report on all of your opportunities.
- **Forecast Analysis** – provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Sales Alert Report** – provides a summary of the opportunities that are behind schedule.
- **Analysis Reports-Detail** – lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary** – reports the number of opportunities by status with total revenue.

Graph and Chart with Maximizer

Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

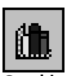
Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and ecommerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to fully understand your audience and evaluate the performance of your business.



When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between “A” and “M”, only those entries will be graphed.

Once your list contains the entries you’re trying to graph, click the Graphing button or choose Graphing from the Tools menu to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/ Province, Opportunity Status, to name only a few, and any table or date user-defined field.

Maximizer creates graphs and charts for all kinds of purposes. Your completed graph can be printed right from Maximizer or saved as a high-quality image file that you can use in documents and presentations.



Graphing button on Advanced toolbar

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can

even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

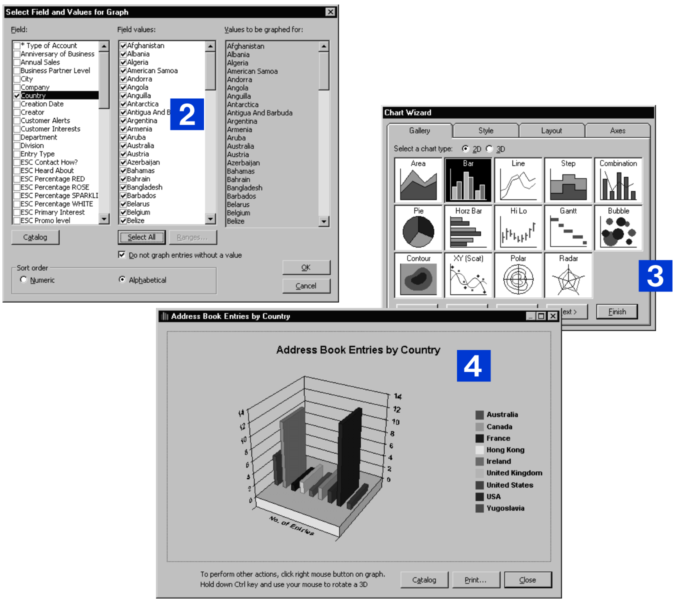
The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

Graph Your Address Book Entries or Opportunities

Generating a graph from your current list of entries is a simple process.

➤ To create a graph

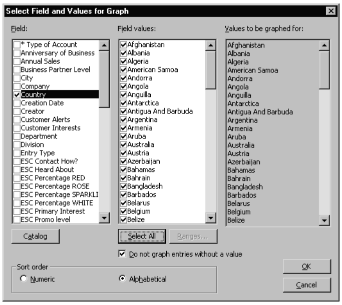
1. Create the desired list of **entries** in the Address Book or Opportunities window, and then click the Graphing button. Alternatively, you can select Tools > Graphing.
2. Choose the **field** and **values** you're graphing. For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.
3. Use the **Chart wizard** to choose the graph type, style, and layout.
4. Edit your graph in the **Graphing window**. You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.



Select the Field and Values for Your Graph

Press F1 in the Select Field and Values for Graph dialog box to learn more about making your selection.

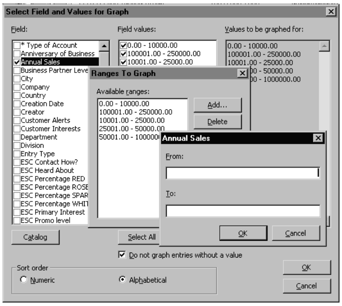
When you click the Graphing button, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, Address, City/Town, or State/County/Province. If the Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status, Team Leader, or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for “Annual Sales”.



This example shows the Country Address Book entry field with all possible values selected for graphing.

Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the “Anniversary of Business” user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range. For example, if you select “Anniversary of Business”, you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.



Click the Range button to specify a range (or ranges) of values for non-table fields.

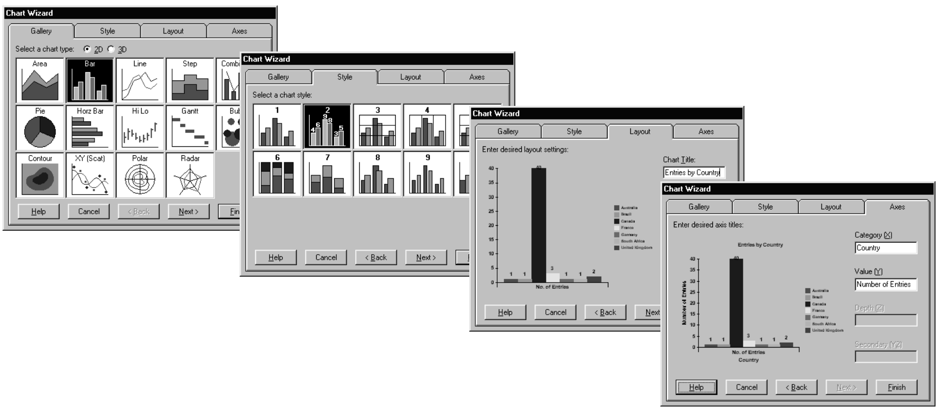
Finally, choose numeric or alphabetical as the sort order:

- **Numeric** displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.

- **Alphabetical** displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

Define the Appearance of Your Graph

- After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:
- **Gallery** – choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).
- **Style** – choose the style based on the chart type you chose in the Gallery tab.
- **Layout** – specify the title, footnote, and legend settings.
- **Axes** – label your graph's axes.



These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

Use Title and Footnote Merge Fields

When you save a graph to the Graphing Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting “date” in the title of graph and then saving the graph to the catalog as a template tells Maximizer to display the current day’s date the next time you generate the graph.

The following fields are available for footers and headers:

- **[count]** The total number of entries graphed.
- **[date]** The date the graph is generated.
- **[login]** The user ID of the logged-in user.
- **[time]** The time the graphic is generated.
- **[user]** The name of the user specified in the Users dialog box in Maximizer.

➤ To insert a title or footnote merge field

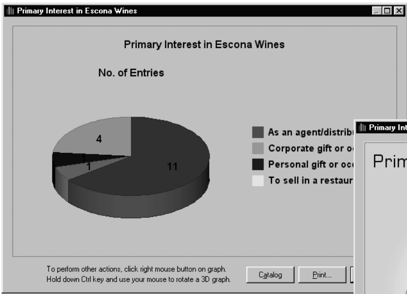
1. Start a **new graph**.
2. In the Chart wizard, select the **Layout** tab.
3. Enter any **fields** you want to appear in the Chart Title and Chart Footnote fields. Remember to surround the field with square brackets, [like this].
4. Finish creating your graph and save it to the **Graphing catalog**.

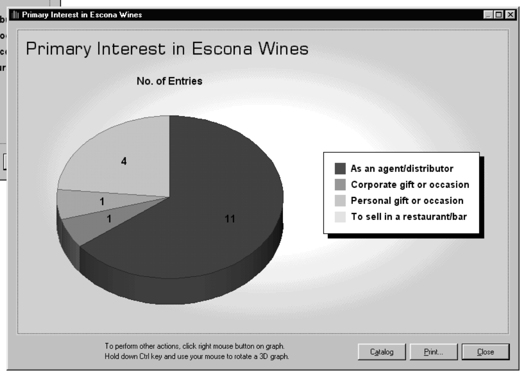
   The first time you create the graph, the field name will display, not the value (i.e., [user] instead of “Bob Smith”). The next time you generate the graph, the value will display correctly.

Add "Zip" to Your Graph

Press F1 in the Graphing window to find out more ways to edit your graph.

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph's colors are chosen for you. You can easily add your own touches to your graph by editing it in the Graphing window.



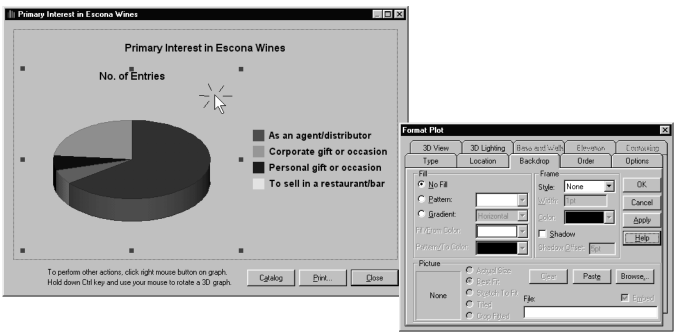


Before and after—the graph as generated by Maximizer (above) and the graph after some editing (right).

You can also right-click inside the graph to display a pop-up menu

You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a "wallpaper" image. Simply select and double-click the element that you want to edit to display a setting dialog box.

A background color can make a plain graph look attractive. To change the background properties double-click within the area of the graph (but not on the graph itself) so that "selection handles" appear around the graph as shown below. The Format Plot dialog box lets you make many changes to your graph.

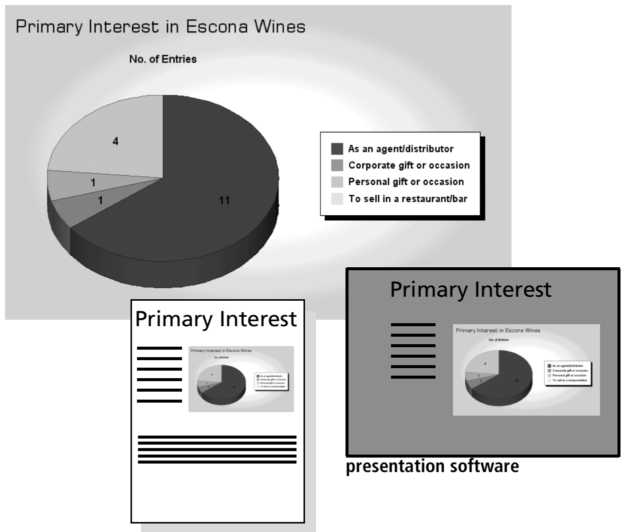


? Click the Help button in the Format Plot dialog box for help using any of the settings.

You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles; if selection handles appear, you can double-click it to edit that element.

Use Your Graph in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.



When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you'll have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is "scalable"—you can resize it without getting any jagged edges.

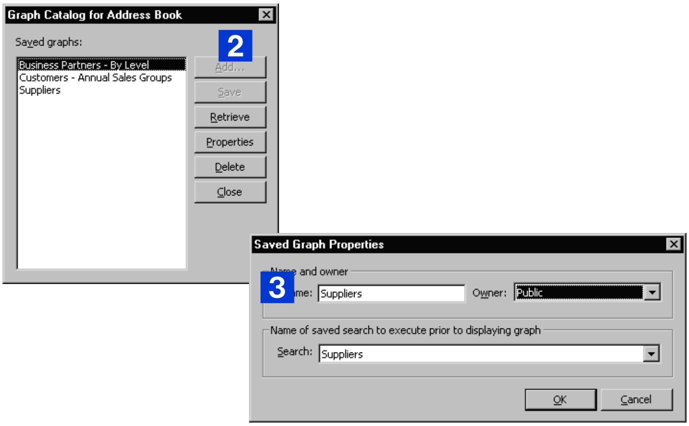
Reuse Your Graph Settings

If you find yourself often creating the same type of graph, save yourself some time by saving the graph settings as a graph template in the Graphing Catalog. After you generate the graph, use the Catalog button to save your graph template.

Graphs for Address Book entries and opportunities are stored in separate catalogs; the available catalog depends on whether the Address Book or Opportunities window is selected.

➤ To use the graph catalog

1. In the Graphing window, click the **Catalog** button to open the Graphing Catalog.
2. Click the **Add** button to add your graph to the catalog.
3. Type a **descriptive name** and choose Public as the "Owner" to make the template available to all users.
4. If you have a search saved in the Search Catalog, select it in the search list to have Maximizer perform the search before generating the graph.



Once your graph template is saved to the Graphing Catalog, you can use the template when you next create a graph.

CHAPTER 12

Using eStore Manager

Build and Publish Your Online Catalog

In this chapter...

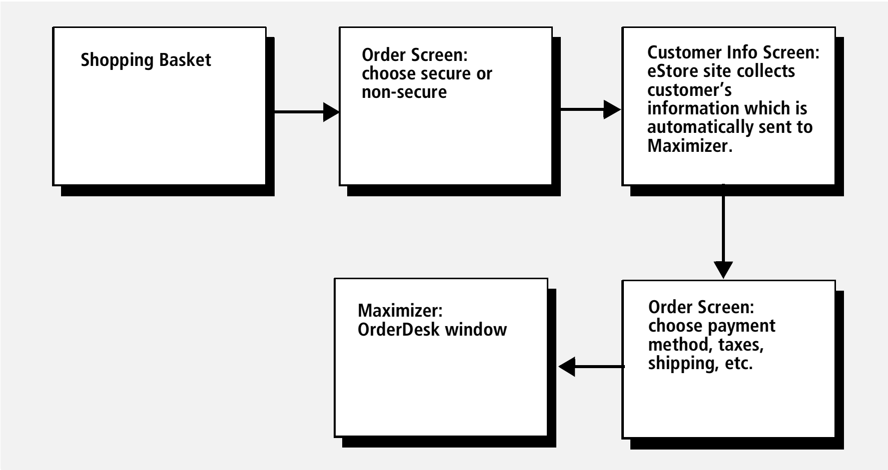
What is eStore Manager?

If you have installed the Escona sample Address Book, you may want to review the Escona Online Catalog as an example of an eStore.

eStore Manager is a Maximizer tool for creating and publishing your online store. eStore is only available if you are running Maximizer on a SQL database; those who are using a Pervasive database should refer to their ecBuilder documentation (online in PDF format—available from the ecBuilder program menu).

eStore includes everything you need for an Internet storefront—a catalog, shopping cart, and online credit card transaction processing. eStore gives you plenty of flexibility in adding product descriptions, product images, pricing, applicable taxes, and shipping costs. Setting up your eStore online catalog is a breeze.

This diagram shows how an order is created starting with the website visitor's shopping cart and finishing in the OrderDesk.

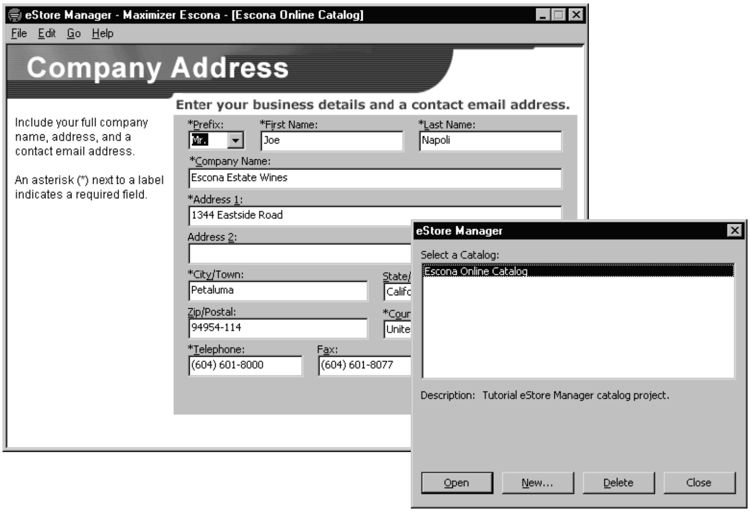


Your online catalog is integrated with Address Book entries and campaigns so your customers' buying experience is customized each time they visit.

Main Window

? Press F1 in any screen or dialog box for help.

eStore makes it easy to construct your online catalog—using a series of wizard screens, you provide eStore with all the information needed to build the catalog.



Get Your Catalog Online

eStore makes it easy for you to create and publish your online catalog. To get your catalog online, you need to perform these steps:

1 **Create the template for your online catalog**.

A template is an HTML page used by eStore to control the appearance of your catalog. The template contains special eStore tags that are replaced by catalog content when you publish the catalog. Your order screens—the screens that display a summary of the customer's order—can also be customized. See "Design Your Catalog's Appearance" on page 230.

2 **Build and publish your online catalog**.

eStore's wizard screens take you through the steps of building your online catalog and publishing it on the web. These steps include providing information about your company, setting up payment methods, and adding catalog sections and items. When you finish building your catalog, the last step is to preview and publish the catalog.

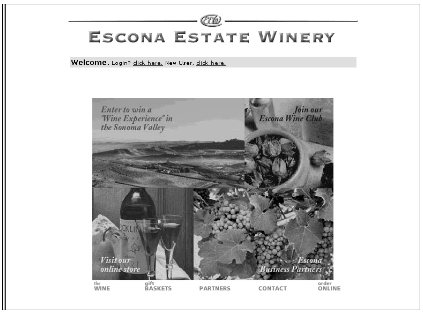
3 **Add links from your company's website to the eStore catalog**.

The final step is the simplest—add a link (or several, if you like) from your company's website to your online catalog. See "Add Links to the eStore Catalog" on page 243.

For an example of a completed online catalog, see the Escona sample Address Book that comes with Maximizer.

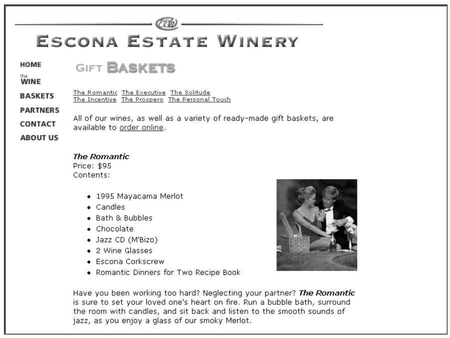
Design Your Catalog's Appearance

The design of your online catalog is saved as template in an eStore project. Your company probably has a standard layout for its website, so you might want to create a template that uses the same layout.



You can design your catalog template to look like your company's website. Just insert the catalog tags in the correct places. This is an example of what a catalog template may look like.

In the completed catalog, eStore replaces the tags with the contents of your catalog. This example shows a detailed product description page from the Escona sample Address Book.



The template is simply an HTML file that contains special eStore tags. You can make your page look any way you like, as long as you insert your eStore tags in the right location. You select your catalog template before you preview and publish your eStore catalog.

The Catalog Template Tags

For visitors to find your site with Internet search engines, you must register your site with each search engine.

Your HTML template must contain the following tags:

- **[THE_META_TAGS]** - Insert this tag between the Head tags in your HTML file. At the time you publish your catalog, eStore replaces this tag with the correct keyword meta tags, which allow visitors to find your site using Internet search engines. The keywords in these meta tags are your business classification keywords.

```
<HEAD>[THE_META_TAGS]</HEAD>
```

- **[THE_HEADER_SCRIPT]** - Insert this tag between the Head tags in your HTML file. This tag is replaced by the eStore Javascripts that are needed on certain pages of the site.

  ```
  <HEAD>[THE_HEADER_SCRIPT]</HEAD>
  ```

- **[THE_BODY_TAGS]** - Insert this as an element within the Body tag. This tag is used to automatically run eStore Javascript functions.

  ```
  <BODY [THE_BODY_TAGS]></BODY>
  ```

- **[THE_CATALOG]** - Insert this tag between the Body tags where you wish to place the main body of your catalog, which should be the main portion of your page. This tag is replaced by the catalog content.

  ```
  <BODY>[THE_CATALOG]</BODY>
  ```

You can greatly enhance the capabilities of the search page by installing the "Full Text Search" SQL component. See the Maximizer Administrator's Guide for more information.

- **[SEARCH]** - Use the Search tag in place of a URL in a link. When your site is published, clicking this link opens the eStore catalog search page, which allows the visitor to search your catalog for specific items. This link can be placed anywhere in the Body of your template.

  ```
  <BODY><A HREF="[SEARCH]">Link text</A></BODY>
  ```

- **A link to "Basket.asp"** - In any location in the Body of your catalog template, include a link to "Basket.asp". When a customer clicks on this link, Maximizer displays the current contents of the customer's shopping basket, where the customer can choose to order the items in the basket. The file "Basket.asp" is dynamically generated by eStore.

  ```
  <BODY><A HREF="Basket.asp">Link text</A></BODY>
  ```

Create the Catalog Template

Create the template using your preferred HTML editor, making sure that you add the eStore template tags in the appropriate places in your markup.

Below is a sample template file that may be used by eStore.

You can use this example as a starting point for your own template. Keep adding to this basic template until you're satisfied with its appearance.

```
<HTML>
<TITLE>Catalog</TITLE>
<HEAD>
[THE_META_TAGS]
[THE_HEADER_SCRIPT]
</HEAD>
<BODY [THE_BODY_TAGS]>
<P><A HREF="[SEARCH]">Search the catalog</A>
<P><A HREF="basket.asp">Your shopping basket</A>
<BR>
[THE_CATALOG]
</BODY>
</HTML>
```

Sample Catalog Templates

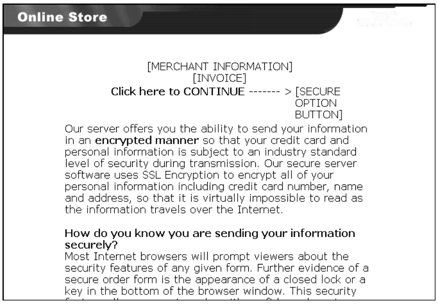
eStore lets you select a sample catalog template in the Online Layout screen by clicking the "Samples..." button and choosing the name of a template. Additional files, including graphics, are listed in the "Additional files used by template file" pane. You can then preview or publish your site using the sample template.

Or use the Browse button to select your own template. Use the Add button to bring in additional HTML files and graphics. To learn more about using the Online Layout screen, see "Make the Finishing Touches and Preview Your Catalog" on page 241.

Customize the Order Screen and Confirmation Email

? To find out how to modify your order screens or email templates, open the eStore online Help and look up "order screen templates" in the index.

The order screen uses HTML templates similar to the catalog template. Although the order screen that comes with Maximizer works well, you may wish to customize the order screen to use your company's logo or to match your company's website.



This is an example of one of the default order screen templates ("SecureOption.html"). The tags (in square brackets) are replaced with the appropriate information at the time the order is made.

This is the order screen as it appears at the time the order is made. Notice that the text in square brackets is now replaced with order information.

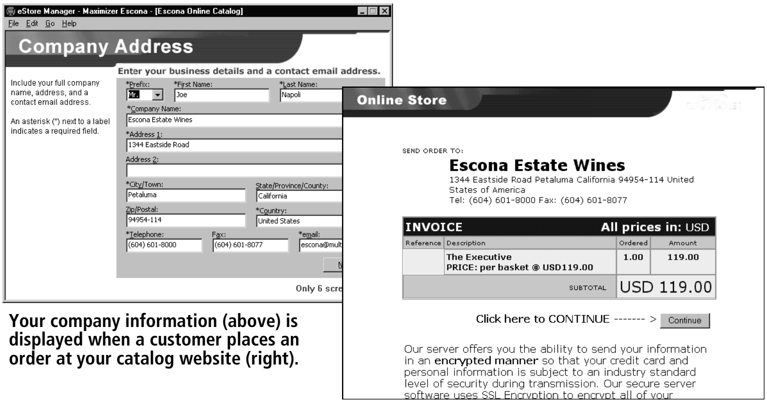
After a successful order, eStore sends a confirmation email message to the customer.

Let Your Visitors Know How to Contact You

The first two screens in eStore collect basic information about your business or organization. eStore uses this information in your online catalog and the order screens.

Enter Your Business Contact Information

The company address and phone numbers that you enter in the first screen are used in the order screens—when a visitor orders an item, Maximizer displays a summary of the order along with your business name and address.



Your company information (above) is displayed when a customer places an order at your catalog website (right).

Select Keywords for Internet Search Engines

One of the principal ways that customers will find your site on the Internet is through Internet search engines, such as Lycos, Yahoo, Alta Vista, and others. Keywords identify to the Internet where you fit in as a business. The Business Classification screen allows you to specify keywords and keyword phrases that assist people in finding your website.

Take your time developing this list. The keywords you provide will directly affect the amount of traffic your site receives through Internet search engines. To ensure that the keywords you select attract the customers you want to your site, keep the following rules in mind.

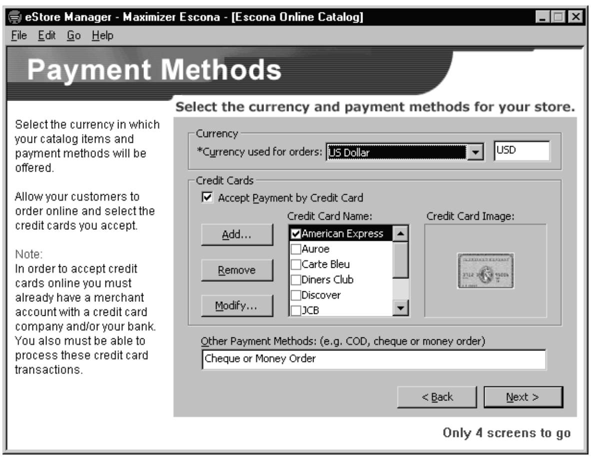
Due to technical constraints, some search engines consider repeating the same keyword multiple times during a submission to be "spam", and will filter out such submissions.

Keyword Rules

- Consider your customers. What words or phrases would they likely use to describe your business, products, or services?
- Use common terms (that is, terms that your customers would commonly use to describe your products).
- Use words that accurately describe your business and products.
- Use synonyms and related words. If your company makes sugar-free gelato, list "gelato" but list "ice cream" too.
- Include phrases and keyword combinations. Many people search for phrases such as "economy car rentals" as well as single words.
- Use the plural form of most keywords (farms, not farm) to capture those who search for the singular form as well as those who search for the plural form. Consider the spelling. If your business is a bakery, include both "bakery" and "bakeries".
- Use different forms or spellings (even common misspellings) of an important keyword.

Choose How to Accept Payment

The Payment Methods screen allows you to specify the currency you will use for pricing and payment on your website. You can also choose whether you will accept credit cards and other payment methods when visitors place an order from your catalog.



In order to accept credit cards online, you must already have a merchant status account with the credit card company, your bank, or both. Once this is set up, you can manage credit card transactions

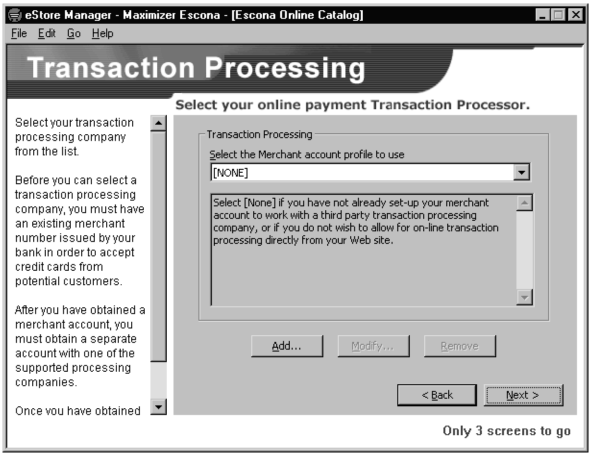
through the OrderDesk window in Maximizer after the customer places the order in your online catalog.

Set Up Online Transaction Processing

You are not required to use online transaction processing—if you wish to use an alternate means of credit card transaction processing, such as manually calling in the transaction, select "[NONE]" in the Transaction Processing screen.

If you have a merchant account with a credit card company or your bank, you may wish to set up online transaction processing. Once this is set up, credit card transactions are processed from your website and are tracked and maintained through the OrderDesk window in Maximizer.

When you create a payment gateway profile in eStore (or Maximizer), the profile will not immediately appear in an order's Payment & Totals tab or the Payment Gateway Profiles dialog box until orders have been placed on your website and transferred by the eStore server to OrderDesk.



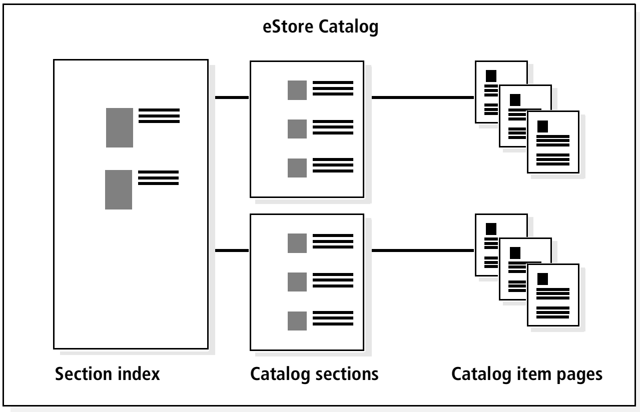
The method and procedures for online transaction processing will vary depending on the transaction processing company. Some may allow you to pre-authorize funds, process transactions after the product has shipped, and issue refunds. With another company, you may only process transactions—funds are taken directly out of a customer's account at the time of purchase. To find out about the transaction processing companies that work with Maximizer, please see the Payment Processing Gateways chapter or online Help.

Build Your Catalog

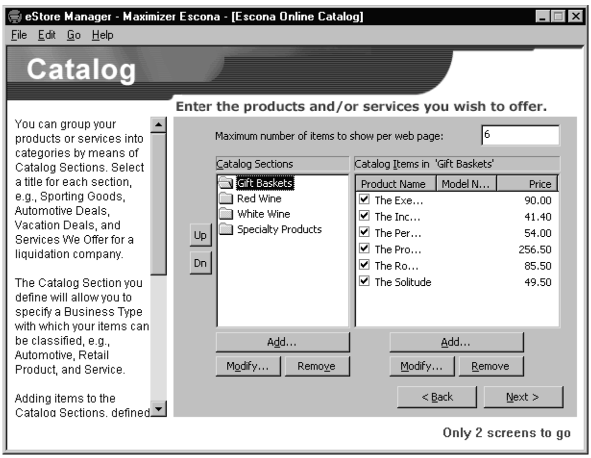
Have a look at the Escona sample Address Book for an example of an online catalog.

The Catalog screen displays a list of all the products and services in each section of your catalog. From this screen, you define sections for your catalog and enter catalog items for each section. You may include any number of products and/or services in your catalog with ample flexibility regarding the number of graphics, descriptions, or pricing schemes you use.

eStore catalog items are grouped into sections, which are listed in the published catalog's section index.



The left pane of the Catalog screen lists all the sections you have set up for your website. The right pane lists all of your items in the selected section. You must define a section before adding items to your catalog.

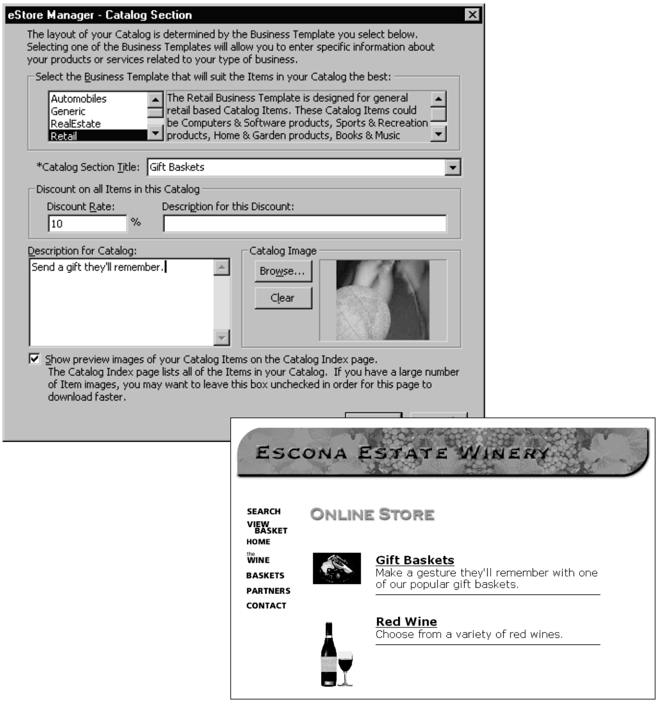


Add Sections to Your Catalog

If you create only one catalog section, eStore shows the catalog item list rather than a catalog section index.

A catalog section performs two functions. First, it allows you to organize the catalog items into similar groupings, which makes it easier for your visitor to browse your catalog. Second, the section controls the kind of information that eStore presents for the catalog items in that section.

When you create a new catalog section, eStore asks for a Business Template. The Generic Business Template might include virtually any type of product; Services could include any type of service; the Real Estate Business Template is best suited for homes and properties. Each of these types lets you enter item information that is best suited to the type of service or product you add to the section.



Add Items to a Catalog Section

To learn more about adding items to your catalog, see the eStore online Help.

Catalog items are the products or services you are advertising or making available for sale on your website. Each catalog item is assigned to a specific catalog section and may include very specific information.

Add an Item with the Catalog Item Wizard

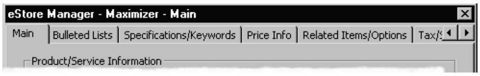
Click the Add button in the Catalog screen to add a new item with the Catalog Item wizard.

You add catalog items using a Catalog Item wizard; click the Add button under the Catalog Items section. The various screens allow you to enter item descriptions, details, specifications, pricing information, related items, and tax/shipping requirements, among others. You may also attach image or media files to specific catalog items.

Use the Inventory section to specify the number of items you have in stock. When the stock is depleted, the shopper sees a "Temporarily out of stock" message. Each time an item is purchased, the inventory is decremented by 1 in the eStore catalog; you should regularly check to ensure the inventory number is correct. You can choose to allow ordering when stock is depleted and the inventory will display in negative units.

Modify a Catalog Item with the Tabbed Dialog Box

Click the tab you want and make changes to the catalog item. Click OK when you've finished your modifications.



When you modify an item entry, the Catalog Item wizard screens appear as several separate tabs in a comprehensive Catalog Item dialog box.

Enter the Item Information

? For help on entering item information, open the eStore online Help and look up "Adding Items".

The information that eStore requires for an item depends on the Business Template used by the section to which you're adding the item. A catalog section using the Real Estate Business Template, for example, will require an address for each catalog item, but other Business Templates wouldn't require an address. Below is a listing of all possible the catalog item screens:

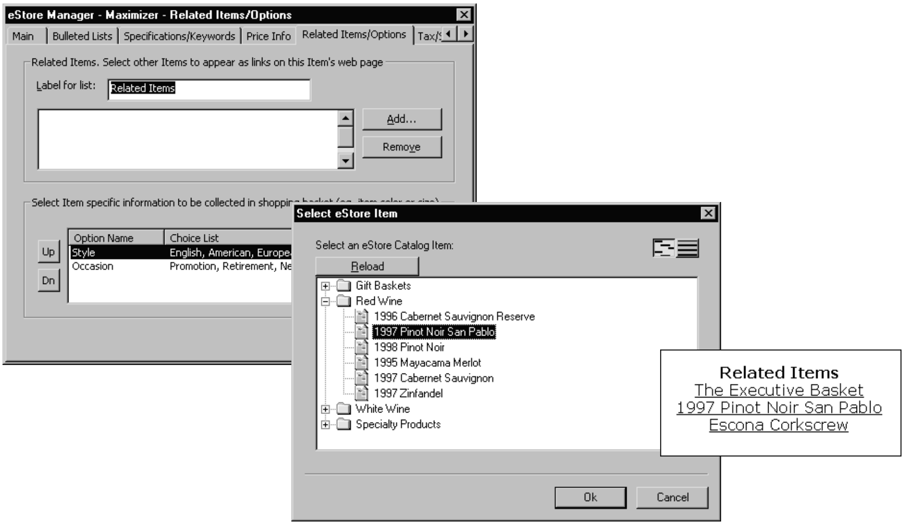
Not all screens are available for all catalog section types.

- **Address** – the address of the property.
- **Main** – the basic information for the catalog item. May include the name, description, and the main image.
- **Bulleted Lists** – the items you enter here will appear as a list on the catalog item's web page.
- **Features** – a listing of details about the item. These details appear as a bulleted list.
- **Specifications** – a list of the product's specifications. These specifications appear as a bulleted list.
- **Keywords** – the keywords let your customer find this item in a catalog search.
- **Details** – size, weight, and other product information.
- **Images/Media** – this tab lets you include additional images, sounds, or animations for your product.
- **Price** – information on how the item is priced.
- **Related Items** – this list appears on the items page, offering the customer the chance to upgrade or add onto their purchase.
- **Options** – specify options such as size or color.
- **Tax/Shipping** – the shipping cost and tax calculations.

Upsell Your Product with Related Items or Options

Try to keep your list of related items to a few helpful—and strategic—suggestions.

An important feature of an eStore catalog is the ability to show the visitor a list of items or options that are related to the one he or she is viewing. You can use this feature to offer your customer an upgrade or an add-on to their purchase. If your customer is shopping for a red wine, for example, you might also suggest wine glasses or a corkscrew.

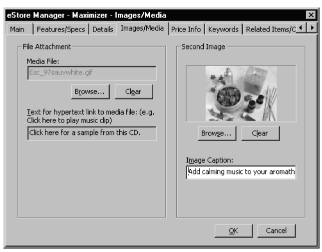


To open the Catalog Item dialog box, select the item in the Catalog screen and click "Modify".

You add related items using the Related Items/Options tab in the Catalog Item dialog box. This tab lets you browse your catalog for items to add to the list. In your published catalog, the related items appear as a list of links to each item's page.

Add Multimedia and Images to Your Catalog Items

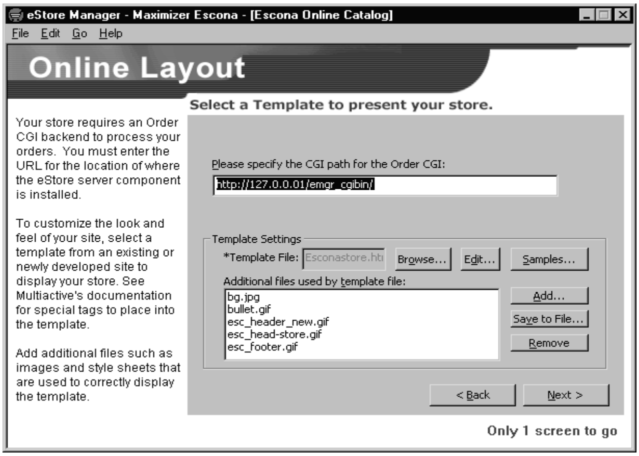
In the Catalog Item dialog box, use the Images/Media tab to add graphics, sound, or animations to your item's web page. Additional images of your product can help your customer get a "feel" for the item. This tab is not available for all Business Template types.



Make the Finishing Touches and Preview Your Catalog

Press F1 in this screen for help.

The Online Layout screen allows you to select a catalog template and edit additional catalog files.



Choose a Catalog Template

You can try one of the pre-made sample catalog templates—click the Samples button in the Online Layout screen.

Browse for the HTML template file you created for your online catalog. If the template uses additional files, such as graphics or media files, you must click the Add button to add them to the eStore project. If you make a change to your template, you must re-select the template so the updated template is added to your catalog project. You can then publish the catalog again.

Editing additional files

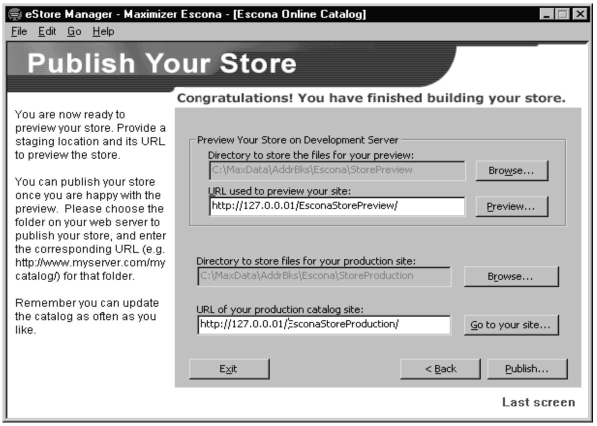
Files associated with the HTML template you're using display in the "Additional files used by..." list in the Online Layout screen. To edit a graphic, for example, select it, click Save To File, and specify a directory. Use a graphics editor like Paint Shop Pro or Photoshop to edit the graphic. Use the Add button to bring it back into the catalog database. The edited file will not overwrite the original if the names are identical; use the Remove button to delete the old version of the file before you add the new version.

Publish Your Catalog on the Internet

? To learn more about publishing your catalog, open the eStore online Help and look up "upload" in the index.

The final stage of building your catalog is to publish the catalog. Publishing the catalog is actually a very simple process—eStore generates the files that make up your eStore website, then copies them to a publicly-accessible folder on your company's web server (the computer running Microsoft Internet Information Server).

For security reasons, your production site—the site where you publish the catalog—may be on a different computer than your preview site.



Specify the Physical Location of the Catalog Files

Make sure you have two virtual directories set up on your IIS server: an internal virtual directory for previewing your catalog and a publicly-accessible virtual directory for the completed catalog. When you specify the location to store the files for preview, you specify the physical location of the preview folder on the IIS server (e.g., "\\servername\catalog"). A virtual directory "points" to the folder in which your catalog's website files are stored.

Enter the URL of Your Preview Site

Enter the IIS server's URL (or the IP address) and the virtual directory of your preview site. If you are working at the IIS server that hosts your site, you can enter "127.0.0.1" as the IP address. eStore uses this URL to display the preview site for you in your web browser.

An example of a URL using an IP address would be in this format: "http://xxx.xxx.xxx.xxx/catalogpreview", where "xxx" is the IP

address. You can also use a domain name (e.g., www.esconawines.com) in place of the IP.

As soon as you publish the catalog, visitors can go to your catalog using their web browser.

Add Links to the eStore Catalog

Setting up virtual directories is normally a task for a system administrator or someone familiar with Microsoft IIS.

The final step in getting your catalog online comes after you publish your catalog. When you publish your catalog, eStore copies the catalog website files to the folder on the IIS server that you specify in the “Publish Your Store” screen. You or your system administrator can set up a virtual directory in IIS that “points” to this physical folder. It is this virtual directory that is the URL—or the web address—of your catalog. For example, if you create the virtual directory “catalog” on your server, then your catalog’s URL would be “http://www.yourserveraddress.com/catalog”.

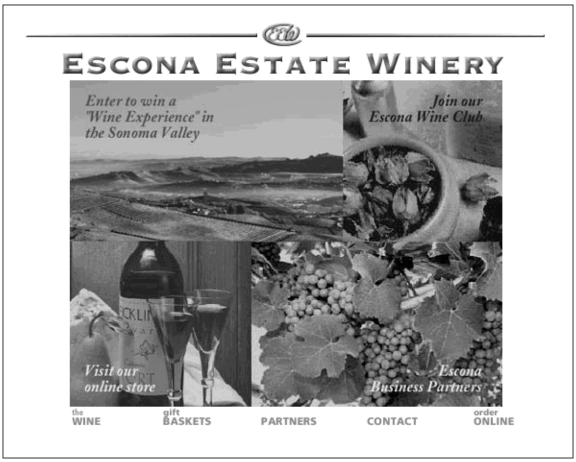
You can add links from your company's website—perhaps right in a navigation bar or menu—to the catalog’s URL. For example, if you publish your catalog to “http://www.escona.com/catalog”, you could include a link in your company's website like the following HTML example:

You can also use a relative URL, rather than the full URL shown here (e.g., “\catalog”).

<A HREF="http://www.escona.com/catalog/">See our online catalog!</A>

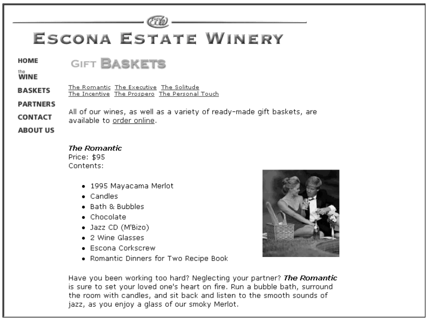
Alternatively, you can use a graphic in place of text in your link, as shown in the example below.

This is an example of what your site could look like.



Your Customer's eStore Experience

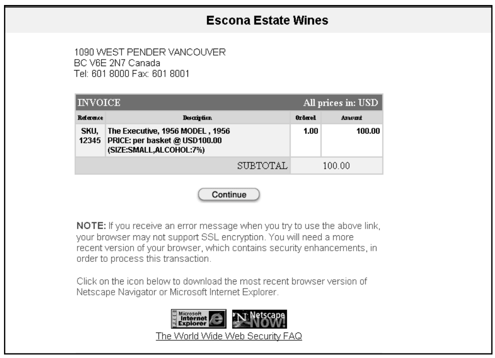
Understanding your customer's experience is an important part of designing your eStore catalog. The illustration below shows an example of a visit to an eStore catalog using the Escona sample website.



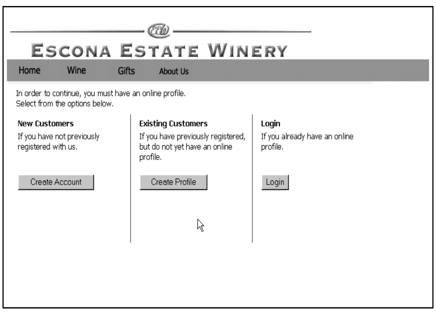
1. The customer arrives at your eStore catalog website using his/her browser.

2. Using the Search page, the customer can search for products by keyword or simply browse the catalog.

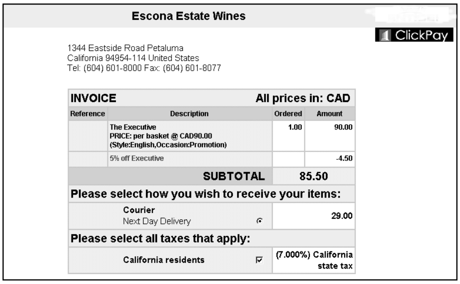
3. In the shopping basket screen, the visitor clicks the "Order Now" button to continue with the order.



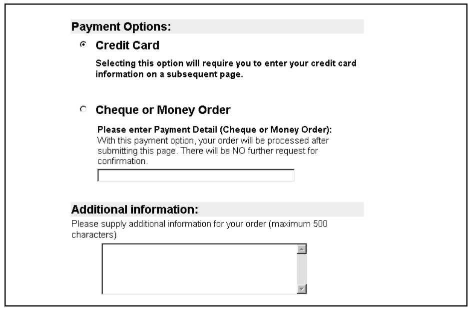
4. The customer is taken to the "order screens" for the catalog. Clicking the Continue button, as illustrated above, ensures credit card information is encrypted.



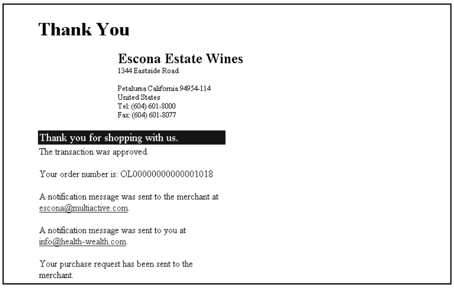
5. The customer is taken to a customer login page. Information such as the customer's first and last name is captured. This information is automatically sent to Maximizer.



6. The customer is then taken to the order screen.



7. The customer chooses how the order will be paid for. If you set up online transaction processing, eStore collects the credit card information in another screen.



8. After the transaction is complete, a "thank you" page appears. Further details provide the customer with information about order email transactions, applied coupons, and shipping. From this screen, a customer may also return to the online catalog.

To further confirm the order, eStore sends a confirmation email to the customer using the email address supplied.

Enhance Your Catalog with the Catalog Search Page

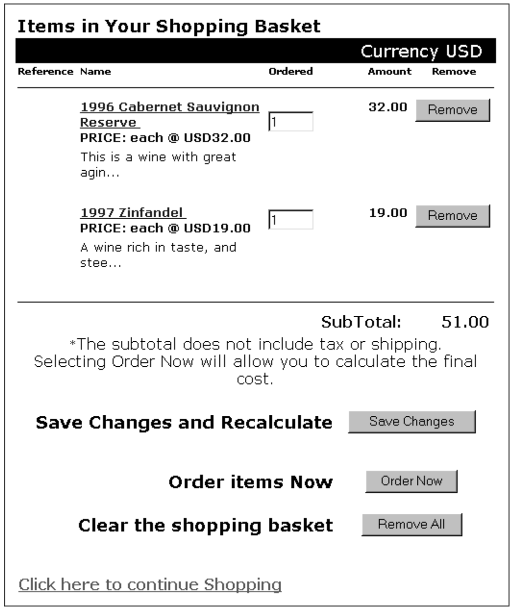
When a visitor arrives at your site, he or she may already have an idea of what to buy, but your catalog may be large enough to make it hard to find certain items by browsing the catalog sections. You need to include a link to the eStore catalog search page.

From the search page, a visitor can search for items by keyword to bring up a list of possible matches.

Your Customer’s Shopping Basket

Your customer will likely want to browse your catalog first before buying anything. As your customer shops, he or she can add items to a shopping basket. Just like a real shopping basket, the eStore basket lets customers add items as they shop and, before paying, review the contents of the basket.

The shopping basket lets the customer adjust quantities, remove items, and view subtotals before ordering.



Select the currency in the Payment Method screen. See “Choose How to Accept Payment” on page 234.

The information shown in the shopping basket includes:

- the type of currency used
- the items, quantities, and options
- the item subtotals
- the basket subtotal

Manage Your Online Orders and Inquiries

Use the Maximizer Web Inquiry Form wizard to create an online data collection form. See "Create Web Inquiry Forms for Your Website" on page 58.

When potential customers visit your ecommerce site, they can complete an online form to either inquire about or order products and services. The data from this form—such as name, address, credit card numbers—is then written to the Maximizer Address Book as an Address Book entry with an attached OrderDesk entry.

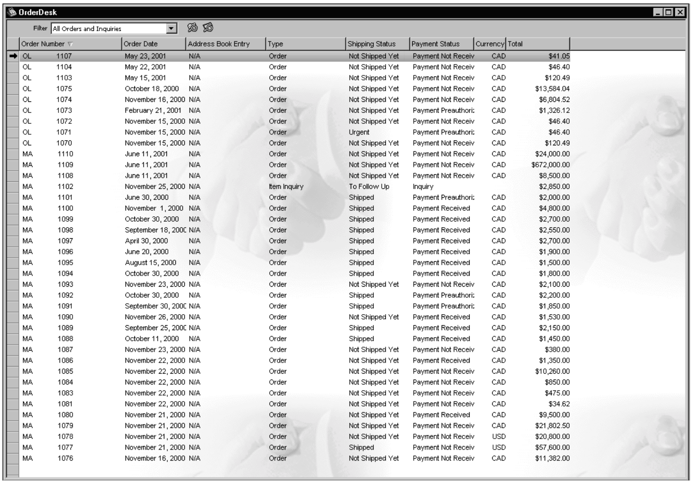
If you are running Maximizer on a Pervasive database, you use ecBuilder to created your online store. If you are running Maximizer on a SQL database, eStore is your tool.

If you are running Maximizer on a SQL database, orders and inquiries automatically arrive in the OrderDesk window from your website.

If you are using a Pervasive database, orders and inquiries arrive in your Maximizer Email window as email messages with an MEC file attachment. Select "All eCommerce Messages" from the Email window's View bar. Order/inquiry emails have the subject line "ecBuilder Inquiry", "ecBuilder Order", or a similar subject. You may wish to save the MEC files in their own folder and double-click the files to import the order/inquiry information.

Order numbers are automatically generated. The prefix indicates the source of the order—MA indicates a manually entered order and OL indicates an order from the online catalog.

Double-click an entry to view or change the details. If you do not use an online transaction processing company, you can open the order and manually mark the payment as received.



Order Number	Order Date	Address Book Entry	Type	Shipping Status	Payment Status	Currency	Total
OL 1107	May 23, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$41.05
OL 1104	May 22, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$46.40
OL 1103	May 15, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$120.49
OL 1075	October 18, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$13,584.04
OL 1074	November 16, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$6,804.52
OL 1073	February 21, 2001	N/A	Order	Not Shipped Yet	Payment Preauthori:	CAD	$1,326.12
OL 1072	November 15, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$46.40
OL 1071	November 15, 2000	N/A	Order	Urgent	Payment Preauthori:	CAD	$46.40
OL 1070	November 15, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$120.49
MA 1110	June 11, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$24,000.00
MA 1109	June 11, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$672,000.00
MA 1108	June 11, 2001	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$8,500.00
MA 1102	November 25, 2000	N/A	Item Inquiry	To Follow Up	Inquiry		$2,850.00
MA 1101	June 30, 2000	N/A	Order	Shipped	Payment Preauthori:	CAD	$2,000.00
MA 1100	November 1, 2000	N/A	Order	Shipped	Payment Received	CAD	$4,800.00
MA 1099	October 30, 2000	N/A	Order	Shipped	Payment Received	CAD	$2,700.00
MA 1098	September 18, 200C	N/A	Order	Shipped	Payment Received	CAD	$2,550.00
MA 1097	April 30, 2000	N/A	Order	Shipped	Payment Received	CAD	$2,700.00
MA 1096	June 20, 2000	N/A	Order	Shipped	Payment Received	CAD	$1,900.00
MA 1095	August 15, 2000	N/A	Order	Shipped	Payment Received	CAD	$1,500.00
MA 1094	October 30, 2000	N/A	Order	Shipped	Payment Received	CAD	$1,800.00
MA 1093	November 23, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$2,100.00
MA 1092	October 30, 2000	N/A	Order	Shipped	Payment Preauthori:	CAD	$2,200.00
MA 1091	September 30, 200C	N/A	Order	Shipped	Payment Preauthori:	CAD	$1,850.00
MA 1090	November 26, 2000	N/A	Order	Not Shipped Yet	Payment Received	CAD	$1,530.00
MA 1089	September 25, 200C	N/A	Order	Shipped	Payment Received	CAD	$2,150.00
MA 1088	October 11, 2000	N/A	Order	Shipped	Payment Received	CAD	$1,450.00
MA 1087	November 23, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$380.00
MA 1086	November 22, 2000	N/A	Order	Not Shipped Yet	Payment Received	CAD	$1,350.00
MA 1085	November 22, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$10,260.00
MA 1084	November 22, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$850.00
MA 1083	November 22, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$475.00
MA 1081	November 22, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$34.62
MA 1080	November 21, 2000	N/A	Order	Not Shipped Yet	Payment Received	CAD	$9,500.00
MA 1079	November 21, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$21,802.50
MA 1078	November 21, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	USD	$20,800.00
MA 1077	November 21, 2000	N/A	Order	Shipped	Payment Not Receiv	USD	$57,600.00
MA 1076	November 16, 2000	N/A	Order	Not Shipped Yet	Payment Not Receiv	CAD	$11,382.00

Use the OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-

authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods.

OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled. It lets you mark specific orders or inquiries as urgent, ignore inquiries without deleting them, and track shipping and payment status for your orders.

You can open the order or inquiry in the OrderDesk window and email the associated customer (Address Book entry) with an automatic reply, a summary of the inquiry. You also can email one or more Maximizer users with a summary of the inquiry.

Credit Card Transaction Processing

If you are using a third-party transaction processing company, the OrderDesk window acts as a desktop point-of-sale software solution that supports real-time credit card transactions. This includes pre-authorization of credit card information, pre-authorization completion and/or capture of funds, and refunds that generate a credit on the customer's credit card account.

With the use of a transaction processing company, funds from the consumer's credit card can be captured immediately. Once the credit card information has been verified and the purchase has been authorized, the information can be securely forwarded via a confirmation email to both the consumer and the merchant.

Payment gateway profiles, sometimes referred to as payment gateway guides or merchant account profiles, are used to facilitate online credit-card transaction processing from your website (which you created with ecBuilder or eStore). When you process an order's credit card transaction using the OrderDesk window, you select the appropriate payment gateway profile from the Payment & Totals tab.

To see which transaction processing companies are supported by Maximizer, select the OrderDesk window, click the Add button in the File > Edit Gateway Settings dialog box and view the items in the Company drop-down list. There is one payment gateway profile per transaction processing company.

Profiles also can be set up using ecBuilder and eStore (see the respective documentation).

Before you set up a profile in Maximizer, you must contact the company and set up a merchant account. This can be done using the Acquire Merchant Account button in the File > Edit Gateway Settings > Add dialog box.

Manually Enter an Order or Inquiry

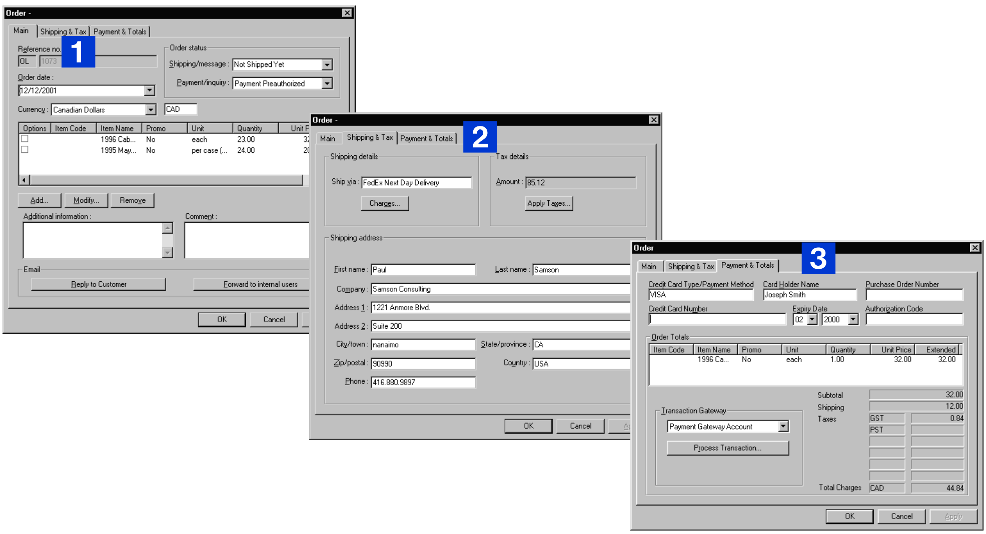
? To learn more about OrderDesk, look up "OrderDesk" in the Maximizer Help index.

Because you will likely receive orders from other sources besides your Maximizer website, OrderDesk allows you to enter orders manually, allowing you to manage all your orders using the same application. The order entry screen in OrderDesk gathers the same information as the online forms that your customers fill out on your website.

An order or inquiry always must be associated with an Address Book entry, so ensure the appropriate entry is selected before clicking the New button in the OrderDesk or Address Book OrderDesk window. You can also drag an Address Book entry to the OrderDesk icon from the Address Book window. Enter the order or inquiry information, pressing F1 at any time for detailed assistance.

➤ To enter an order

1. Use the **Main** tab to enter the items ordered and set the payment and shipping status.
2. Specify the **shipping method** and **taxes**, and enter the **shipping address**.
3. Use the **Payment & Totals** tab to record the payment information. If you have online transaction processing set up, you can process credit card transactions—payments, authorizations, refunds, and more.



As shown in the previous example, manually entering an order is a simple three-step process. The “Order Status” settings in the Main tab let you manage and track the progress of orders—you can sort your OrderDesk list by either status column to help you find unshipped orders or orders that need attention.

When you manually add an item to an order, you can save yourself time by selecting the item (and its information) from your Maximizer online catalog using the Get Info From Catalog button in the Item dialog box.

Features of the OrderDesk Window

To summarize, the OrderDesk window includes the following capabilities:

- Ability to manage orders or inquiries from your online catalog site.
- Manual entry of orders or inquiries received from other sources.
- Manual pre-authorization, authorization, and refunding of payments made against a consumer’s credit card.
- Tracking of the inquiry, order, shipping, and payment status.
- Automatic calculation of taxes and shipping costs.
- Automatic email to customers or Maximizer users with summary of order or inquiry.
- Filtering of records to display only specific entries or entry types.

CHAPTER 13

Using MaxExchange Remote

Working with MaxExchange Remote

In this chapter...

How MaxExchange Programs Work Together

MaxExchange consists of the following applications:

- MaxExchange Synchronization Server
- MaxExchange Remote Synchronization Server
- MaxExchange Remote
- MaxExchange Site Manager

MaxExchange Server

One person is usually in charge of setting up and administering the central Address Book. This Master user acts as an administrator for the MaxExchange Server, designates a Maximizer Address Book as the central Address Book, and schedules its updates.

There is only one server for any given central Address Book, but one server can have many remotes. These sites are either remote servers or remotes, which can be connected by LAN, WAN, dial-up access, or through the Internet. Although different images of the Address Book are kept on separate computers, the server and its remotes work together on a single central Address Book which is updated periodically by the MaxExchange synchronization process.

Although MaxExchange Remote Server can be installed as a service, MaxExchange Server Manager is not installed. You manage the application through MaxExchange Remote Server.

MaxExchange Server can also be installed as a service on Windows 2000, Windows XP, and Windows NT. The service runs in the background, as any other Windows service, and typical processing is done automatically. Manual control of processing or any other server tasks are then done through the MaxExchange Server Manager from another machine or on the server.

MaxExchange Remote Server

MaxExchange Remote Synchronization Server acts as a middle tier in a multi-tiered synchronization tree. Remotes run MaxExchange Remote Synchronization Server to synchronize their remote changes with those on the site's parent server, which is either the MaxExchange Synchronization Server or a MaxExchange Remote Synchronization Server.

MaxExchange Remote Synchronization Server has the following two basic functions:

- It synchronizes changes from its remotes with the server and receives updates from the server.
- It generates and sends its own updates to its remotes.

MaxExchange Server Manager

MaxExchange Server Manager is a utility used to access the server from another computer. When you install MaxExchange Server as a service, this utility is used to perform manual tasks on the server.

MaxExchange Remote

MaxExchange Remote users synchronize the entire image or a sub-set image of the central Address Book on their remote computers. Remote users also update the central Address Book with changes made on the remotes.

MaxExchange Site Manager

To determine which portions of the central Address Book go to each remote, using MaxExchange Site Manager, the Master user defines remotes/remote servers and the distribution groups to which the remote sites belong. Other important functions of Site Manager are to perform Address Book maintenance on remotes, send refreshes to remotes, set up event notifications, and generate reports. Site Manager is also used to set up teams for campaign and opportunity synchronization.

Glossary of MaxExchange Terms

Use this list of terms to help familiarize yourself with the terminology of MaxExchange.

Central Address Book – A Maximizer Address Book that you specify for MaxExchange Server to synchronize with its remotes, which run MaxExchange Remote. The server maintains the central, master image of this Address Book (often at the head office of a company), while the remote computers maintain either partial or complete images of the same Address Book (at remote offices).

Although different images of the Address Book are kept on separate computers, together, the server and its remotes effectively work on a single central Address Book, which is periodically updated by the MaxExchange synchronization process.

Distribution Group – A Distribution Group comprises several remotes that maintain a particular image of the central Address Book. The Master user of the central Address Book uses the MaxExchange Site Manager program to determine which remotes belong to each distribution group.

For more information on configuring Maximizer to work with MaxExchange, see chapter 4 "Setting Up MaxExchange" on page 35.

The *MaxExchange Distribution user-defined field, which you create in Administrator, determines which companies and individuals in your central Address Book are distributed to the various remotes. The field is created in Administrator's System Options preferences by clicking the associated button. This field then appears within your User-Defined Fields list and you add values for your distribution groups as necessary.

Distribution Site (Remote) – A computer where MaxExchange Remote is installed. See the Remote glossary definition.

DRB File/Table – A file (Pervasive) or table (SQL) that is used by MaxExchange to track the distribution list of Address Book entries and opportunities for each remote. This list is created based on the Distribution Group value associated with an Address Book entry for the *MaxExchange Distribution field.

Remote – A computer where a MaxExchange Remote is installed, and on which a partial or complete image of the central Address Book is stored. Remotes are set up and maintained by the Master user, using the MaxExchange Site Manager program.

Typically, several remotes belong to a distribution group. These distribution groups are associated with Address Book entries. You assign default distribution groups to Address Book entries based on the creator of the entry; each user can be assigned a set of distribution groups and when the user creates an entry, the default distribution groups are automatically assigned. User setup is done in the Security properties of User Setup in Administrator.

Master User – The Master user is the owner or the administrator of a Maximizer Address Book. For MaxExchange, the Master user administers the central Address Book from the server. The Master user grants users access to the Address Book and, if required, restricts their ability to view, add, or delete data or to perform certain functions. The Master user is also the only user authorized to use the MaxExchange Site Manager application to set up remotes and distribution groups.

Transaction Journalling – Transaction Journalling is the process by which Maximizer maintains a record of changes made by users to an Address Book. This transaction record, stored in the file MXZTRAN.MAX for Pervasive users or in the EXCH_Transactions table for SQL users, is used by MaxExchange to determine how to synchronize a central Address Book.

Transaction Journalling is enabled in Administrator in the System Options preferences. This functionality should not be enabled until you are ready to process data so that unnecessary transactions do not occur.

User-defined field – User-defined fields (UDFs) are customizable fields in Maximizer that you can use to categorize the Address Book entries and opportunities in your Address Books. You can use UDFs to group Companies, Individuals, Contacts, and opportunities in many

different ways such as by occupation, hobby, income level, revenue, or any other criteria you want to use.

MaxExchange uses a special user-defined field called *MaxExchange Distribution to determine how to distribute information in a central Address Book to different remotes.

How Do I Receive Updates?

If your computer is set up for email transport, check to see that your email application is running. Then start MaxExchange Remote.

When you communicate with the server for the first time, the server (or a remote server) sends your computer a data packet with an image of all or part of the central Address Book. (Some entries in the central Address Book may not apply to you, so the Master user may exclude them from your Address Book image.) From then on, you receive updates to the central Address Book periodically.

You run MaxExchange Remote to synchronize your Distribution Site changes with those on the server. The same information is then stored on both the server and remote computers, so that all files are part of the same, single central Address Book. Here is how it works:

- The server assembles Address Book updates in packets, and sends them to your computer, and those of other users at other Distribution Sites. On your computer, MaxExchange Remote then picks up this data, transfers it to a temporary inbox, and later updates or replaces the data in your central Address Book.
- On your computer, MaxExchange Remote assembles Address Book updates in packets, and sends them to the server. MaxExchange server then picks up the data packets, transfers them to a temporary inbox, and updates the server central Address Book files.

Occasionally, you may receive a message from the Master user informing you that he or she is sending you a refresh (a fresh replacement image of your MaxExchange data). When the refresh arrives and is processed, MaxExchange Remote deletes and completely replaces the image of the central Address Book currently on your computer with the new, refreshed version from the server.

You can set MaxExchange Remote to check for updates on a regular schedule. Or, if you prefer, you can request an immediate update at any time. See “Perform an Immediate Update” on page 264 for instructions.

Start MaxExchange Remote

➤ To start MaxExchange Remote

- Select **Programs** from the **Start menu**. Then from the Maximizer or MaxExchange folder, select **MaxExchange Remote**.

Receive the Address Book

When your system administrator instructs you to do so, start MaxExchange Remote. You will receive an image of the central Address Book and be prompted to save it in a folder of your choice.

If you plan to employ FTP transport, you must first initiate a MaxExchange FTP communication session with the server and pick up the data packet before you can later process it.

If you are a dial-up email user, be sure to set up MaxExchange Remote for a dial-up connection. For more information, see "Set Scheduling Options for Dial-up Email" on page 262.

If you use email or Network Direct transport, you will receive an image of the central Address Book in the "MaxExchange\Inbox\<hexadecimal>" folder on your Distribution Site computer assuming you have successful data transport from the server. Note that when you receive an image by email the information arrives in the inbox and is moved to the Hexadecimal folder after processing begins.

Please pay special attention to the instructions particular to the transport method your computer will employ with the MaxExchange server. If you are unsure about the transport method you will use, contact your system administrator before proceeding.

➤ To receive the central Address Book

1. Ensure that you have received your first data packet from the server on your computer. Your system administrator will inform you of when an initial data packet has been created and when the packet will be transported to your computer.
   - **FTP** – You must first pick up the data packet from the server. See the instructions below on how to initiate your first MaxExchange FTP transport session.
   - **Network Direct** – In your "MaxExchange\Inbox \<hexadecimal>" folder, look for two files—one with the

extension ATT and the other with the extension HDR. If they exist, you have received a MaxExchange data packet.

- **Email** – If you see an email message entitled "MaxExchange Data Packet" in your email inbox, you have received a MaxExchange data packet.

The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

2. Start **MaxExchange Remote**.

3. Depending on the transport method you plan to employ:

   - **FTP** – You must start by initiating a communication session with the MaxExchange server. Select **File > Connect New FTP Server**. Enter the server IP address (or the server name), port number, Password (the MAXEXCHANGE password entered at the server), and Address Book ID for this Distribution Site. Click **OK** when finished.

     MaxExchange should immediately initiate an FTP session with the server. If it is successful, a dialog will appear asking for the Address Book you want to designate as your synchronized MaxExchange folder. You may select an existing folder from the drop-down list or create a new folder. Once this is established, the refresh data packet is transported from the MaxExchange server to this remote Distribution Site computer.

     Email or Network Direct – Click the **Process Data Packets** button. A dialog will appear asking for the Address Book you want to designate as your synchronized MaxExchange folder. You may select an existing folder from the drop-down list or create a new folder.

4. After the Address Book has been established, MaxExchange Remote will inform you that a refresh packet is ready to process. Click **Yes**. The processing status is displayed in the MaxExchange window.

5. When packet processing has ended, open the synchronized Address Book in Maximizer. Examine your data to ensure that it is correct and complete.

Remote Tasks

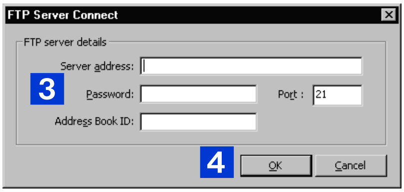
This section outlines the tasks you will perform using MaxExchange Remote.

Initiate the First FTP Transport Session

MaxExchange FTP transport can be initiated only by the Distribution Site computer—not the server. Accordingly, a new Distribution Site needs to enter information into MaxExchange Remote for this transport to start.

➤ To initiate the first MaxExchange transport session with the server

1. You must receive the following information from your system administrator—the server's IP Address and/or server name, the FTP port number, the MaxExchange FTP password, and your unique Address Book ID (hexadecimal number).
2. Select **File > Connect New FTP Server**.
3. Enter the **server's IP** address or server name, the **MaxExchange FTP password**, and your unique **Address Book ID**.
4. Click **OK**. MaxExchange Remote will immediately open an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.



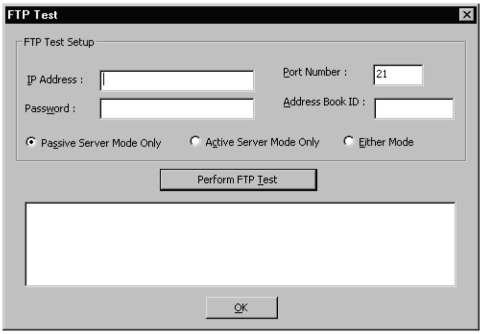
5. Select **File > Process Data Packets**.

After your initial data packet has been processed successfully, the File > Connect New FTP Server dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication session, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

FTP Test Option

See the F1 Help for detailed information on each of these fields.

If the connection fails, try using the FTP Test functionality. This is a method to test the FTP connection providing detailed information of why a connection fails, if necessary.



Retry an Unsuccessful FTP Connection

If you attempt an initial FTP communications session and receive notification from the program of FTP communication failure, you may select File > Retry FTP Server Connect to re-enter your FTP settings and re-establish an FTP session with the server.

➤ To retry a failed FTP communication session with the server

1. Select **File > Retry FTP Server Connect**.
2. Verify that you have entered the correct server's IP Address and/or server name, FTP port number, the MaxExchange FTP password, and your unique Address Book ID.
3. Click **OK**.
4. MaxExchange Remote immediately opens an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.
5. Select **File > Process Data Packets**.

   After your initial data packet has been processed successfully, the File > Retry FTP Server Connect dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

Set Scheduling Options for Dial-up Email

If you are using dial-up email to exchange updates with the MaxExchange server, you can set a schedule for processing and sending the updates.

You can set up MaxExchange Remote and your email connection to automate the process of dialing into the email system and sending and receiving central Address Book updates. When you set up an automatic dial-up schedule, you do not need to see MaxExchange Remote again until you want to change its settings. You simply set your email application to automatically connect using the same schedule you set for MaxExchange Remote. For more information about scheduling email connections, see the documentation for your email program.

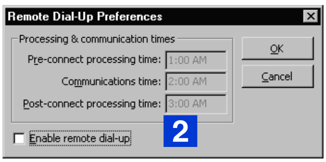
Remote dial-up scheduling can be used only when

- Email is the Active Transport Method for your MaxExchange data transport, and
- the third-party email program you employ has its remote email client/driver set.

When dial-up email is not installed, the Edit > Remote Dial-Up Preferences dialog is unavailable.

➤ To set remote dial-up scheduling options

1. Select **Edit > Remote Dial-Up Preferences**.
2. In the Remote Dial-Up Preferences dialog box, select the **Enable Remote Dial-Up** checkbox.



3. In the Pre-Connect Processing Time field, type the time at which you want to create outgoing data packets for later transmission to the server.
4. In the Communications Time field, type the time at which you want the update data packets placed in your email outbox.

   You must configure your email program to connect and send and receive mail separately. You should set it to do so sometime later than the Communications Time.
5. In the Post-connect Processing Time field, type the time at which you want MaxExchange Remote to process incoming data

packets from the server to update your image of the central Address Book.

6 Click **OK**.

Set All Other Transport Method Scheduling Options

Timing Preferences in the Edit menu schedules updates for all transport except dial-up email. This includes FTP, Network Direct transport, and LAN email. You can set how frequently MaxExchange Remote processes data packets. At the interval you specify, MaxExchange Remote will transport its updates to the MaxExchange server.

Your computer must be on, and MaxExchange and the email system must be operating for MaxExchange synchronization to occur successfully. Your computer must have MaxExchange Remote running, all necessary transport resources must be enabled (e.g., modem turned on), and required transport access to the server must be available.

➤ To set the update frequency

1 Select **Edit > Timing Preferences**.

In the Timing Preferences dialog box, specify the processing and transport times you desire. The behavior of each option depends on the Transport Method used.

2 Choose **Manually** (transports packets immediately after the initiation of a processing session), **Simultaneously** (transports immediately after processing), or **Independently** (process and transport at different times).

3 Transaction Processing Settings allow you to set processing to be activated automatically at a specific time.

If no First Process time or Processing Interval is set, data packet processing will occur only when you do immediate processing using the File > Process Data Packets command.

If you want to schedule a data processing time, enter the fields as follows:

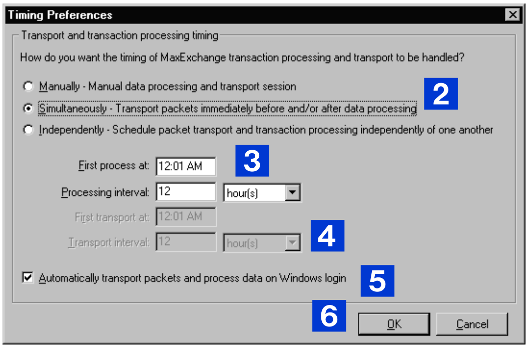
- In the **First Process At** field, type the **time** at which processing is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Processing Interval** field, type the **frequency** and select the units for how often processing should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

4 Transport Time Settings are available only when Independently is chosen above. These settings allow you to transport packets at times independent of when you process data packets.

- In the **First Transport At** field, type the time at which transport is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Transport Interval** field, type the frequency and select the units for how often transport should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

5 Select the **Automatically transport packets and process data on Windows login** option to automatically start processing when you log into Windows.

6 Click **OK**.



You must exit and restart MaxExchange Remote for your changes to take effect.

Perform an Immediate Update

When required, you can perform an immediate update of the central Address Book. MaxExchange Remote checks for incoming changes from the MaxExchange server, then makes these changes to the central Address Book.

After the incoming changes have been processed, MaxExchange Remote prepares and sends data packets to the server for redistribution to its other Distribution Sites. Once the overall synchronization is complete, the whole central Address Book (both on the server and at the Distribution Sites) is up to date.

If you are using email as a transport method, your computer must be running and the email system must be operating for MaxExchange to perform an immediate update.

Your computer must have MaxExchange Remote running, all necessary transport resources must be enabled (e.g., modem turned on), and required transport access to the server must be available.

➤ To perform an immediate update

- Click the **Process Data Packets** button or select **File > Process Data Packets**.

  MaxExchange Remote updates the central Address Book by first checking for updates from the server and processing them, then preparing and distributing your local changes back to the server for redistribution. (If you enable Remote Dial-up, the order of these processes may be reversed. See "Set Scheduling Options for Dial-up Email" on page 262 for more information.)

  Regardless of which transport method is used, Process Data Packets simply creates a data packet and puts it into a folder for transport to the server.

  - **FTP** – The data packet files—.ATT and .HDR—are created and put into the \maxexchange\outbox\<hexadecimal> folder. The Distribution Site computer will later initiate an FTP transport session and pick up the packet.
  - **Network Direct** – A new data packet is created (.HDR and .ATT files) and put into a folder for transport. When the data packet is in the folder, the packet is transported immediately if you have selected Simultaneous in the Processing and Transport Times dialog box.
  - **Email** – The data packet is sent immediately to your local email outbox, encapsulated in an email message, and transported during your next email session.

ⓘ The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

Change the Email Preferences

To optimize MaxExchange Remote operations when using email data transport, you may specify the email system you plan to use in the Email Preferences dialog box.

When you select your email system in the Email Preferences dialog box, MaxExchange accounts for the differences in the third party email software to ensure proper transport operation.

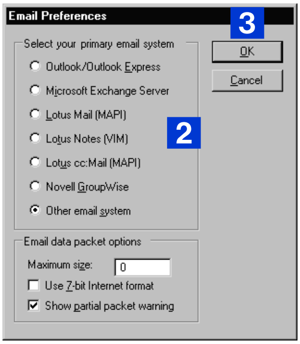
Email Preferences is available only when email transport is your Active Transport Method. Otherwise, it is disabled in the menu.

Email Preferences need only be set or changed when:

- You are installing MaxExchange Remote.
- You are changing your email software.
- Your Active Transport Method is changed to email.

➤ Setting Email Preferences

1. Select **Edit > Email Preferences**.
2. Select the email system that applies to your computer.
3. Click OK.



Change Your MaxExchange FTP Password

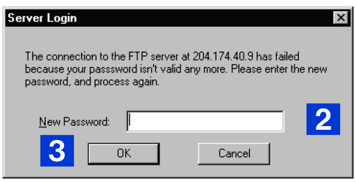
When the MAXEXCHANGE user profile Password changes, all Distribution Sites need to receive this information so that they can access the MaxExchange FTP server.

The MAXEXCHANGE Password can be changed only at the server using the MaxExchange Site Manager. When the Password is changed, and the change is processed by the server, the change is contained in a data packet for each Distribution Site to pick up.

➤ Changing your MaxExchange FTP password

1. Click **Process Data Packets**. The data packet containing the Password change is downloaded to your computer.

   If your computer is set to use FTP transport, and the server FTP password has been changed, you will receive the Server Login dialog:
2. Enter the password given to you by your system administrator.
3. Click **OK**.



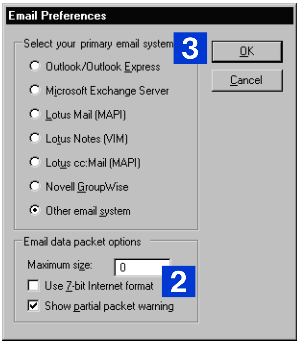
To process any additional packets retrieved after the Password change, click Process Data Packets once again.

Convert Outgoing Packets for Internet Transport

Internet email uses a different encoding standard than many LAN email packages. Therefore, if you send data packets over the Internet to the MaxExchange server, the packets must be converted to 7-bit Internet format.

➤ To convert packets for Internet transport

1. Select **Edit > Email Preferences**.
2. Select **Use 7-bit Internet Format**.
3. Click **OK**.



All subsequent data packet files are converted to 7-bit Internet format before being sent to the server.

Restrict the Size of Packets

Depending on the potential size of the updates or the file size limits specified in your email system, you may need to limit the size of your MaxExchange data packets to prevent data from being lost.

➤ To limit the size of packet files

1. Select **Edit > Email Preferences**.
2. In the Maximum Size field, specify the maximum size of the file in kilobytes (KB). (If you do not know your file size limit, consult your network administrator or email documentation.)

   For no limit on data packet size, leave the field blank.

3. Click **OK**.

   MaxExchange Remote ensures that no subsequent data packets are larger than the size you specified.

Disable the Partial Packet Warning Message

If you set a maximum packet size above, packets created by MaxExchange that are larger must be split into multiple packets that do not exceed the maximum size. Until all such partial packets are received, the Distribution Site cannot process any of the complete packets' parts. When MaxExchange Remote cannot process because all of the partial packets are not received, it displays a Partial Packet Warning dialog.

The Show Partial Packet warning dialog is enabled on installation. When this warning dialog is enabled, you must respond to the dialog before other packet processing can continue. If the warning dialog is disabled, packet processing can continue without your response, but partial packet occurrence may go unnoticed.

➤ To disable the Partial Packet Warning dialog

1. Select **Edit > Email Preferences**.
2. Deselect (disable) the **Show Partial Packet Warning** checkbox.
3. Click **OK**.

Save Outgoing Packets to Disk

When necessary, you can save outgoing data packets to disk such as floppy diskettes or other removable media, so the packets can later be imported by the Master user into the MaxExchange server.

➤ To save a packet to disk

- Select **File > Save to Disk**.

  The Save to Disk menu item in the File menu should now have a check mark next to it.

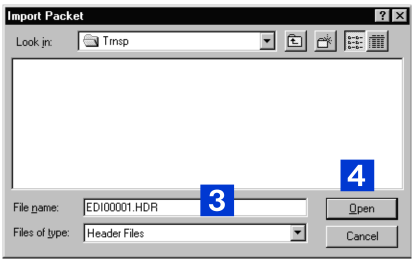
All subsequent data packets are saved to disk instead of being transmitted by email. Once the data packets have been saved to disk, you must send the disks to the Master user at the server location.

Import a Server Packet

There may be times when you receive data packets from the MaxExchange server that were saved to disk or a hard drive directory (folder).

➤ To import a server packet

1. Insert the appropriate disk containing the server data packet in your disk drive.
2. Select **File > Import Packet**.
3. Specify the location and filename of the server data packet.
4. Click **Open**.



The data packet is copied to a processing queue and will be applied to the central Address Book during the next processing of data packets.

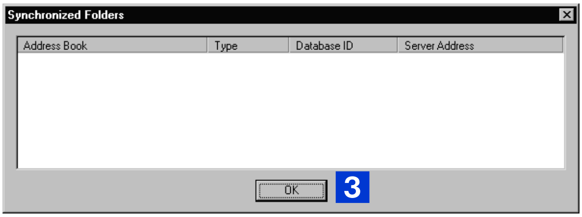
View Synchronized Address Books

You may view certain transport information for every synchronized Address Book on a Distribution Site computer. MaxExchange reads transport information contained in the MXZREM.MAX file in the "MaxExchange" program directory.

➤ To view synchronized Address Books on a remote computer.

1. Select **View > Synchronized Folders**.
2. The Address Book name, its transport method, Address Book ID, server address, and server port number are shown. You can change the server address and port number if necessary.

3 When finished viewing, click **OK** to exit the dialog.

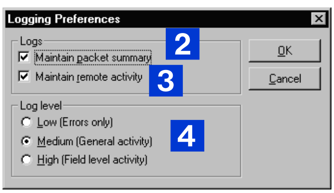


Set Up the Troubleshooting Logs

You can log MaxExchange Remote activity in troubleshooting logs. MaxExchange Remote creates two logs (a Packet Summary Log, Packetlog.txt, and a Remote Activity log, Rmdmlog.txt), both of which are text files located in the same directory (folder) as your MaxExchange programs.

➤ To create logs

1. Select **Edit > Logging Preferences**.
2. To log when data packets are received by your computer, select **Maintain Packet Summary**. Log information is saved in the text file Packetlog.txt.
3. To log detailed information about when data packets are sent and received, and what happens to them, select **Maintain Remote Activity**. Log information is saved in the file Rmdmlog.txt.
4. Indicate the **level of log detail** you want to see in the Rmdmlog.txt:
   - To log errors only, select Low.
   - To log record-level updates (additions, changes, and deletions of Maximizer entries), select Medium.
   - To log field-level updates (details of changes within Maximizer entries), select High.
5. Click **OK**.



Check the Troubleshooting Logs

If you employ email transport, you may also check your email system's conversation log for more information.

If you have set the troubleshooting logs to record MaxExchange activity, you can check the logs when you experience problems during a synchronization session or suspect that updates are not being sent or received.

Remote Activity Log (Rmdmlog.txt)

Check the Rmdmlog.txt by selecting View > Remote Activity Log. The Rmdmlog.txt file can include:

- The number of information packets sent.
- The number of information packets received.
- The number of additions, updates, and deletions made to your image of the central Address Book.

The contents of the log depend on the detail level you set when configuring MaxExchange Remote's log file.

Packet Summary Log (Packetlog.txt)

For information about the date and time information packets were received, check the Packetlog.txt by selecting View > Packet Summary Log.

Change Email from LAN to Dial-Up or Vice Versa

To change a Distribution Site computer from a LAN remote to dial-up remote, or vice versa, you must make changes to both the MaxExchange Remote settings and your current mail driver on the Distribution Site computer.

➤ **To change a LAN email remote to a dial-up email remote:**

1. Select **Edit > Remote Dial-Up Preferences**. Set all time fields in the Process and Transport Timing group box and select the Enable Remote Dial-Up checkbox.
2. Change your current mail driver from Network to **Remote**. Contact your system administrator for additional details.
3. Ensure that the automatic dial-up time of your email communications program corresponds to the processing and communication times set above.

Chapter 14

Glossary of Terms

Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer Enterprise.

Address Book – a Maximizer database.

Address Book entry – a Company, Individual, or Contact in the Maximizer Address Book.

Administrator – a Maximizer module in which the system administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

Administrator's Guide – a Maximizer reference guide for system administrators.

Allaire JRun Java Servlet Engine – a Java servlet engine used for online transaction processing. JRun is only one possible Java servlet engine that you may use. See the Maximizer Administrator's Guide.

Application Server – see Maximizer Application Server.

Automated campaign – a series of automated emails, faxes, or printed documents that Maximizer sends on a predefined schedule. An Automated campaign is based on an Automated campaign template.

Calendar – a Maximizer window in which you can manage your appointments.

campaign template – a pre-defined strategy used by Email and Traditional marketing campaigns. See Automated Campaign and Traditional Campaign.

catalog – a product listing created using eStore. You build your catalog by adding sections and catalog items, and publish the catalog on your web server.

catalog item – an individual product or service in your online catalog.

catalog section – a category for classifying types of catalog items.

Company – an Address Book entry used to record information for a company or organization.

Company Library – a shared library of company literature.

Contact – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Controlling window – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

Customer service user-defined fields – up to 10 Address Book entry user-defined fields can be flagged in Administrator as pertaining to customer service so they can be quickly assigned while a case is open. These are accessed by the “More” button in the case dialog box.

discounts – a special price reduction that you can apply to individual catalog items or your entire catalog. Discounts are not associated with particular customers (i.e., Address Book entries).

email – a message sent via the Internet.

eStore Manager – a Maximizer module used to create and publish a web-based catalog in which website visitors can purchase products online.

Escona – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer’s possibilities.

Following window – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

Holiday Editor – a tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – a window in Maximizer used to display tasks and appointments in a specific date range.

HTML – HyperText Markup Language. A document format used for displaying web pages in a browser.

IIS – see Microsoft Internet Information Server.

Internet – a network of computers around the world. The World Wide Web is a part of the Internet.

intranet – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

IP address – a number used to uniquely identify a specific computer on the Internet. Every Internet-connected computer has an IP address. In Maximizer, you use the IIS server’s IP address when you preview or publish your online catalog.

Java servlet engine – a Java-based portion of the Payment Gateway Module that is used for online transaction processing.

Key Indicators – a component of Employee Portal that displays real-time information on your company using dashboard-style instrumentation.

Knowledge base – a database containing articles pertaining to solutions for customer service and/or technical issues.

list – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

ListsNOW.com – an Internet list-brokering service that provides you with access to over 200 million households in the US and UK. The lists can be downloaded to your computer and then imported directly into Maximizer as Address Book entries. You can then use the data for your marketing campaigns or sales prospecting activities.

log in – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your ID and password.

marketing team – used with campaigns to organize marketing efforts in a team environment. Set up using Administrator.

Master user – the system administrator's user ID. This user ID permits access to Administrator.

MaxExchange Site Manager – a utility for creating and managing sales and marketing teams. MaxExchange Site Manager is accessed through Administrator.

MaxExchange – a Maximizer program used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

Maximizer – a Maximizer Enterprise module in which you can perform contact management and sales force automation activities.

Maximizer Application Server – the principal Windows NT Server where you install Maximizer.

Maximizer Link – Maximizer and Maximizer Link for the Palm OS form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of the Palm OS device. Maximizer Link information and help is available to those with Maximizer Link installed.

Maximizer Remote Workstation (MaxExchange Remote) – a computer that has the Maximizer client components installed and connects to the Maximizer Application Server.

merge field – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

Microsoft Internet Information Server – web server software included with the Windows NT 4.0 Option Pack. IIS 5.0 is included with Windows 2000. Internet Information Server—or "IIS"—is used for many of the Maximizer components.

Microsoft SQL Server – a database server used by Maximizer for the Address Book data.

Microsoft Windows NT Server – the operating system used by the servers.

note – a text document attached to Address Book entries, Contacts, opportunities, and campaigns.

OLE – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

online – information that is “online” is sometimes used to describe information on the Internet or on your computer screen. An “online” user guide or “online” Help is documentation displayed on your screen.

opportunity – an entry in Maximizer used to record an opportunity to make a sale. Opportunities can organize a sales team using a structured sales strategy.

OrderDesk – a window in Maximizer used to manage orders and inquiries from your online catalog.

order screens – some of the screens displayed to a customer when he/she orders a catalog item. Order screens can be customized by editing the order screen templates (see the eStore online Help).

preferences – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

prospect – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your marketing campaigns or sales prospecting activities.

related entries – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

sales team – a team created using Administrator to support team-based work on sales opportunities in Maximizer.

search engine – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Yahoo!, Lycos, Excite, and AltaVista.

shopping basket – much like a real shopping basket, the eStore shopping basket lets customers add items as they browse your catalog and see a list of items before they proceed to the order screens.

strategies – a structured, team-based approach to pursuing sales opportunities. Strategies define the steps, activities, and roles involved in successfully completing a sale.

SMTP – an SMTP server is a server used for outgoing Internet email.

SQL – see Microsoft SQL Server.

template – a file that outlines the design for a document, email, or web page. Maximizer uses templates for word processor documents, for automated activities that belong to Automated campaigns, and for HTML pages used by eStore. Templates can contain merge fields for bulk mailings. Also, see Campaign Template.

thin-client applications – allow you to remotely access Maximizer Address Book data using the web. "Maximizer on the Web" consists of Employee Portal, Wireless Employee Portal, Partner Portal, and Customer Portal.

Traditional campaign – used to organize a marketing effort, including a marketing team's steps, activities, and roles.

Training Guide – the Maximizer Training Guide introduces Maximizer using exercises and examples. You can obtain the Maximizer Training Guide where you purchased Maximizer.

transaction processing – credit card transactions can be processed from your online catalog using a transaction processing company.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user-defined field – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, campaigns, and users.

user ID – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

virtual directory – an IIS folder that "points" to a physical location on the server. The contents of the physical folder that the virtual directory refers to is accessible to the Internet or intranet via the IIS server.

Windows NT Server – see Microsoft Windows NT Server.

wizard – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program. For example, eStore uses a wizard to help you create your online catalog.

workstation – see Maximizer Workstation.

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